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System for Administration, Training, and Educational Resources for NASA

Brio Intelligence Explorer 6.6.4 Basics



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Human Resources Development Branch

For internal use only





Objectives

At the conclusion of this class, the student will be able to:

1. **Create a Training History by Learner report.**
2. **Create a Training History by Organization report.**
3. **Create a History Export report.**
4. **Export Brio reports to Excel.**
5. **Save a report in Brio, including the query and results.**
6. **Place limits on data and use sorting to create ad hoc reports.**
7. **Create a pivot table to summarize data and perform mathematical functions relating to training expenditures, training instances, etc.**
8. **Create a chart or graph from an existing pivot table.**
9. **Create a custom chart/graph using results from the query.**
10. **Identify other useful reports.**



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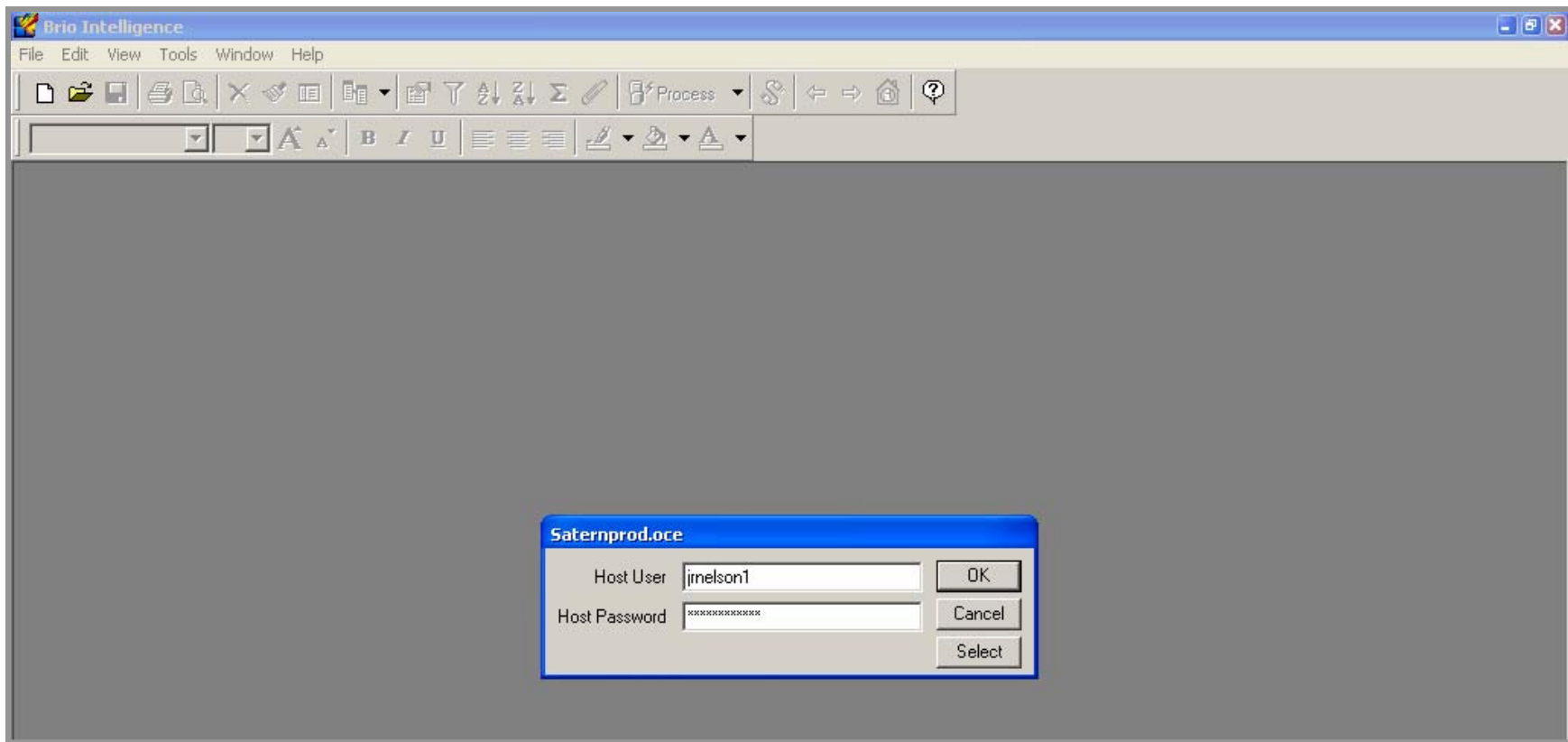
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Exercise 1:

Training History by Learner

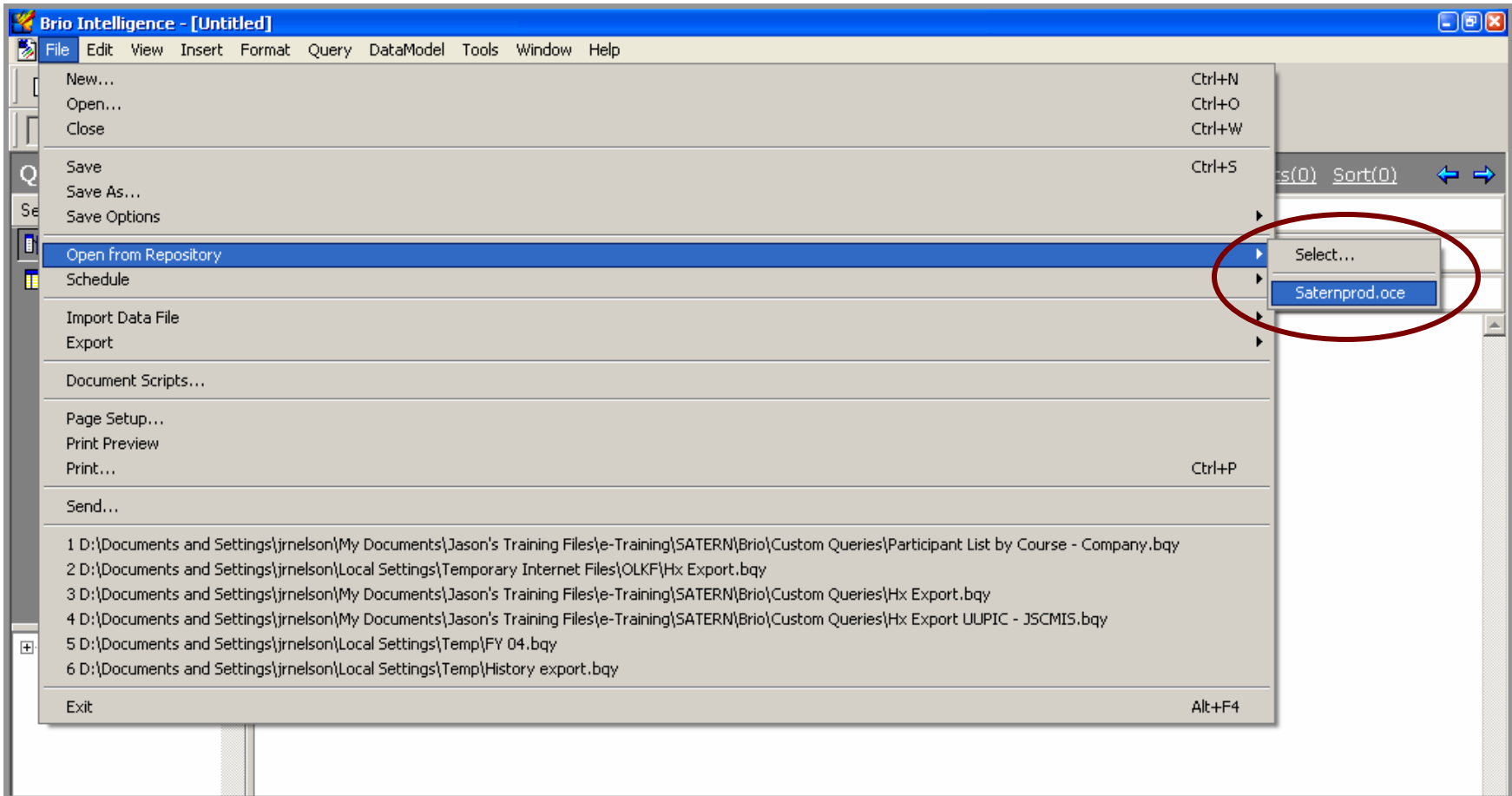


Step 1: Login to Brio Intelligence 6.6.4



Exercise 1: Training History by Learner

Step 2: Click **File > Open from Repository > Saternprod.oce**



Step 3: Open Training History by Learner

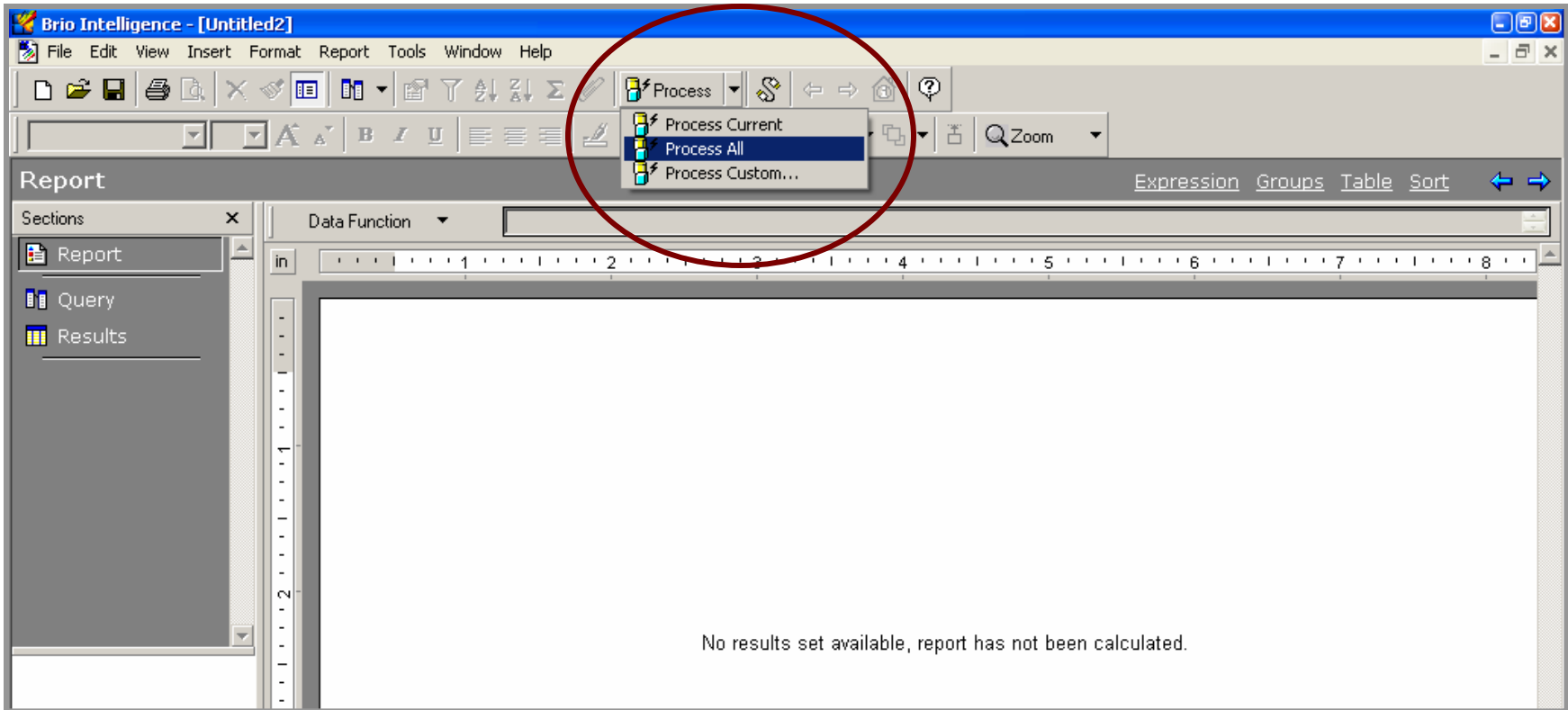
The screenshot displays the Brio Intelligence software interface. The main window is titled 'Brio Intelligence - [Untitled]' and features a menu bar (File, Edit, View, Insert, Format, Query, DataModel, Tools, Window, Help) and a toolbar. The 'Query' pane on the left shows 'Sections' with 'Query' and 'Results' tabs. The 'Query' tab is active, showing a 'Sort' field with the instruction 'Drag Request Items here to sort them', a 'Limit' field with 'Drag Topic or Computed Request Items here to create Limits', and a 'Request' field with 'Drag Topic Items here to build a Query'. The 'Open from Repository' dialog box is open, showing a list of queries. The query 'Training History by Learner' is highlighted and circled in red. The 'Model Info' section on the right of the dialog provides details for the selected query:

Model Info	
Unique Name:	Training History by Learner
Creator:	aw_301
Created:	05/05/06 08:59 AM
Description	
Training History by Learner	

Buttons for 'Open', 'Cancel', and 'Help' are located on the right side of the dialog.

Exercise 1: Training History by Learner

Step 4: Click on **Process** pull down menu and select **Process All**.

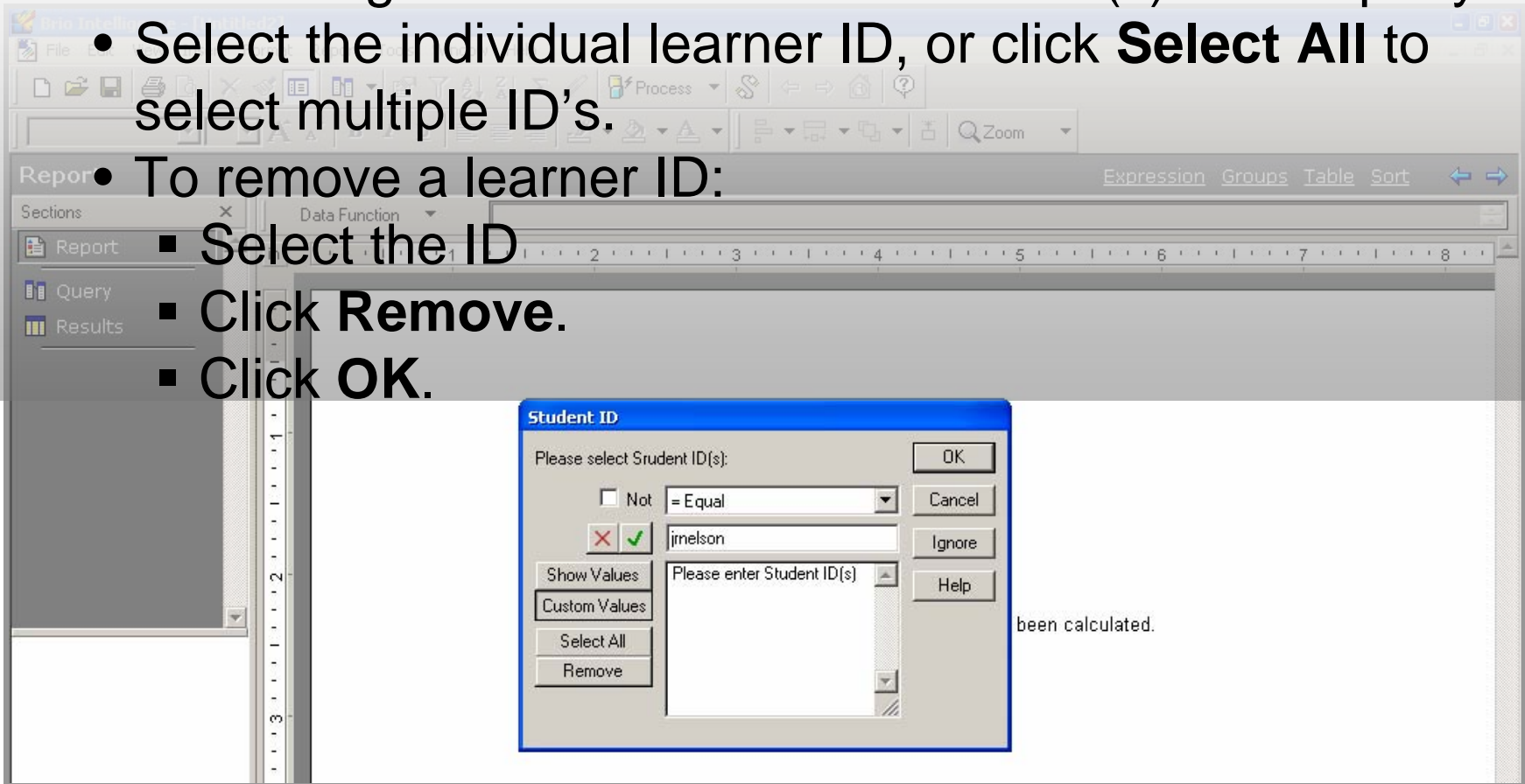


Step 5: Choose Learner ID(s).

- Click on **Custom Values** then, type the learner ID.
- Click the green check to add learner ID(s) to the query.
- Select the individual learner ID, or click **Select All** to select multiple ID's.

- To remove a learner ID:

- Select the ID
- Click **Remove**.
- Click **OK**.



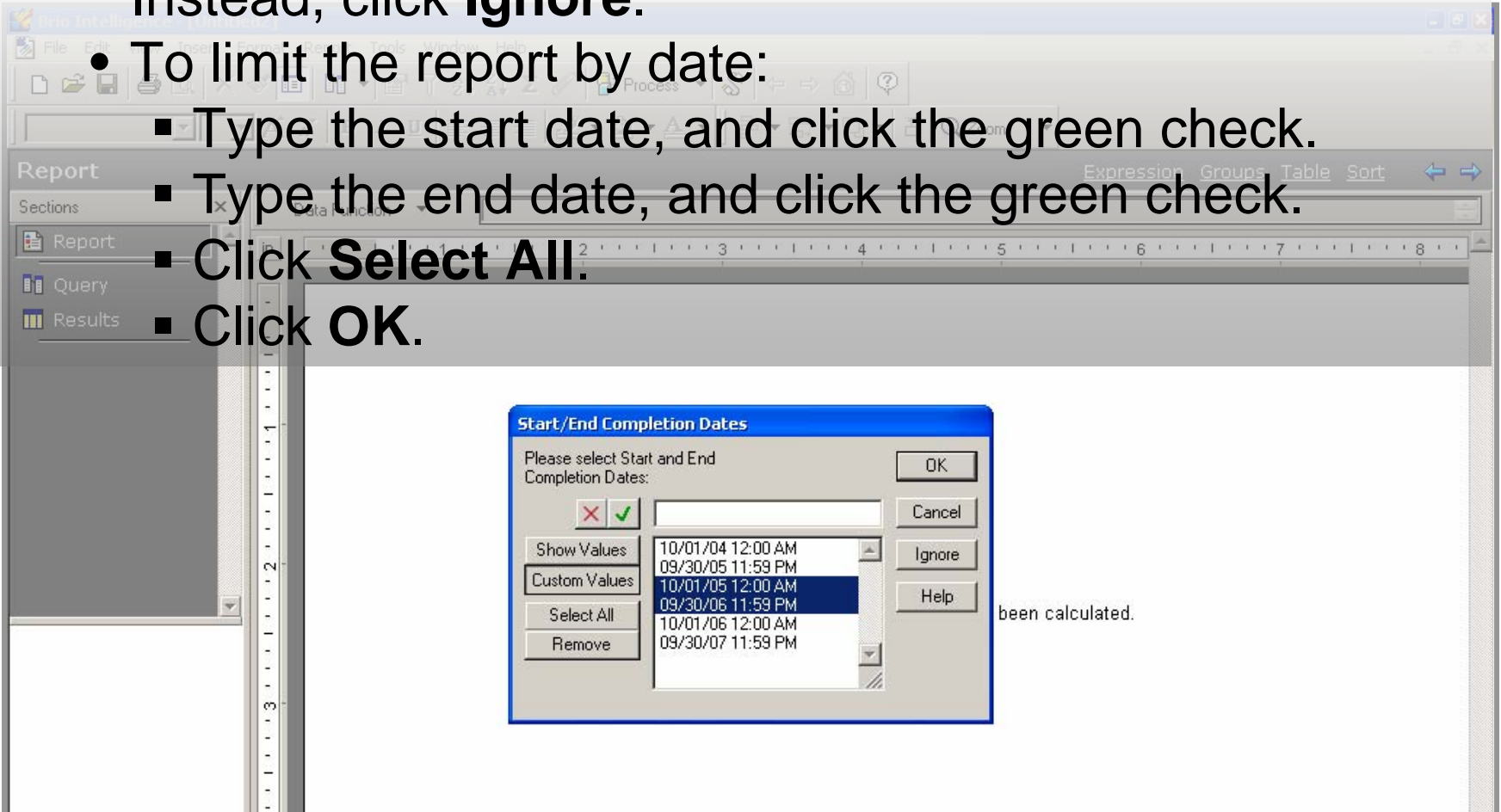
been calculated.

Step 6: Select Start/End Completion Dates.

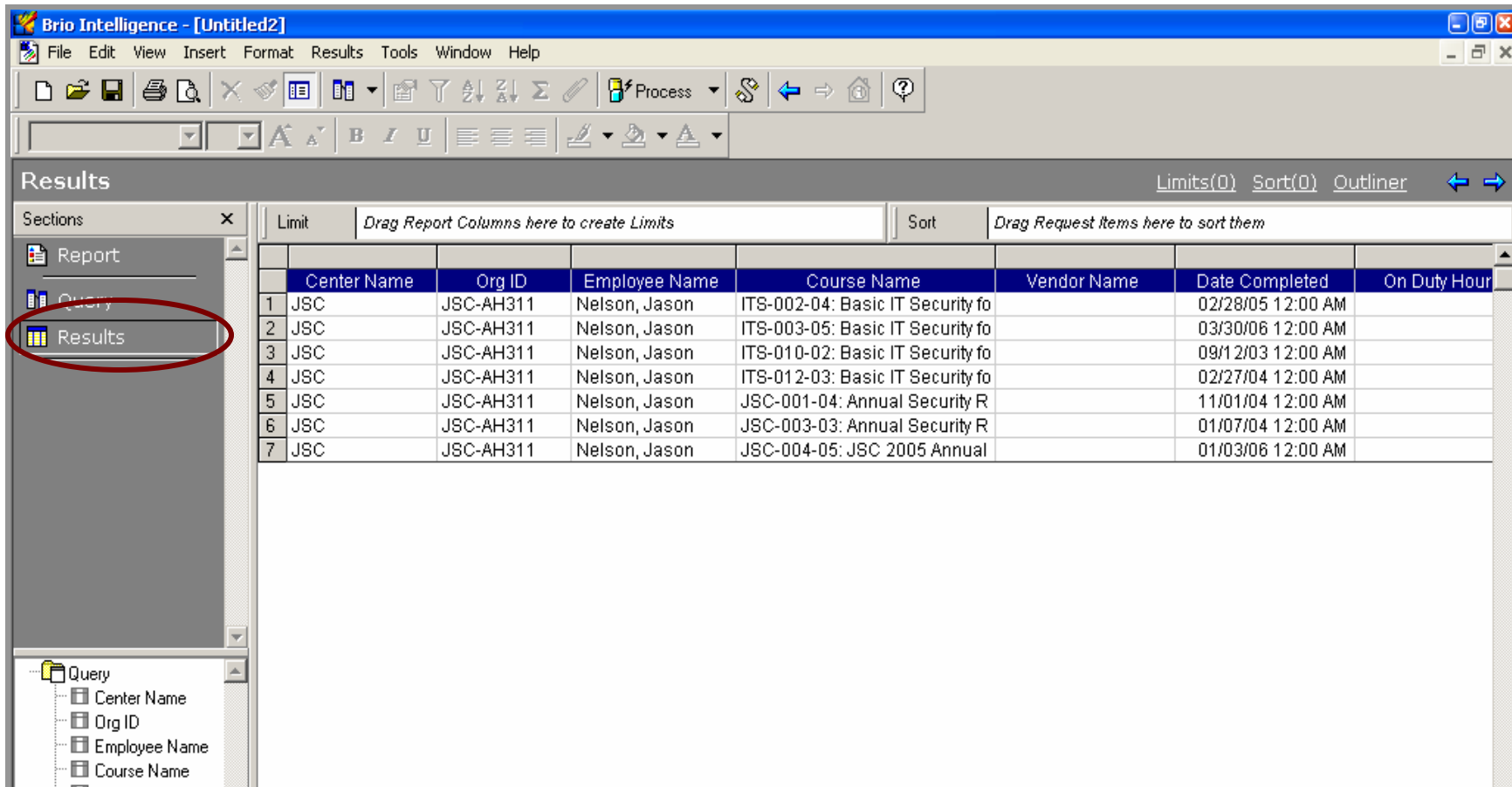
- To get a complete history, do not enter any dates. Instead, click **Ignore**.

- To limit the report by date:

- Type the start date, and click the green check.
- Type the end date, and click the green check.
- Click **Select All**.
- Click **OK**.



Step 7: Click **Results** to see the results in a table.



The screenshot shows the Brio Intelligence - [Untitled2] window. The 'Results' tab is selected in the left sidebar, and the main area displays a table of training data. The table has 8 columns: Center Name, Org ID, Employee Name, Course Name, Vendor Name, Date Completed, and On Duty Hour. The data is sorted by Date Completed in descending order.

	Center Name	Org ID	Employee Name	Course Name	Vendor Name	Date Completed	On Duty Hour
1	JSC	JSC-AH311	Nelson, Jason	ITS-002-04: Basic IT Security fo		02/28/05 12:00 AM	
2	JSC	JSC-AH311	Nelson, Jason	ITS-003-05: Basic IT Security fo		03/30/06 12:00 AM	
3	JSC	JSC-AH311	Nelson, Jason	ITS-010-02: Basic IT Security fo		09/12/03 12:00 AM	
4	JSC	JSC-AH311	Nelson, Jason	ITS-012-03: Basic IT Security fo		02/27/04 12:00 AM	
5	JSC	JSC-AH311	Nelson, Jason	JSC-001-04: Annual Security R		11/01/04 12:00 AM	
6	JSC	JSC-AH311	Nelson, Jason	JSC-003-03: Annual Security R		01/07/04 12:00 AM	
7	JSC	JSC-AH311	Nelson, Jason	JSC-004-05: JSC 2005 Annual		01/03/06 12:00 AM	

Exercise 1: Training History by Learner

To export the data to Excel:
Click on **File > Export > Section**

The screenshot shows the Brio Intelligence application window with the 'File' menu open. The 'Export' option is highlighted, and the 'Section...' option is selected. The 'Export Section' dialog box is open, showing the 'Save in' location as 'Desktop'. The 'File name' field contains 'Nelson Training History' and the 'Save as type' is set to 'Excel (*.xls)'. The 'Save' button is circled in red.

Then, name and **Save** the file...



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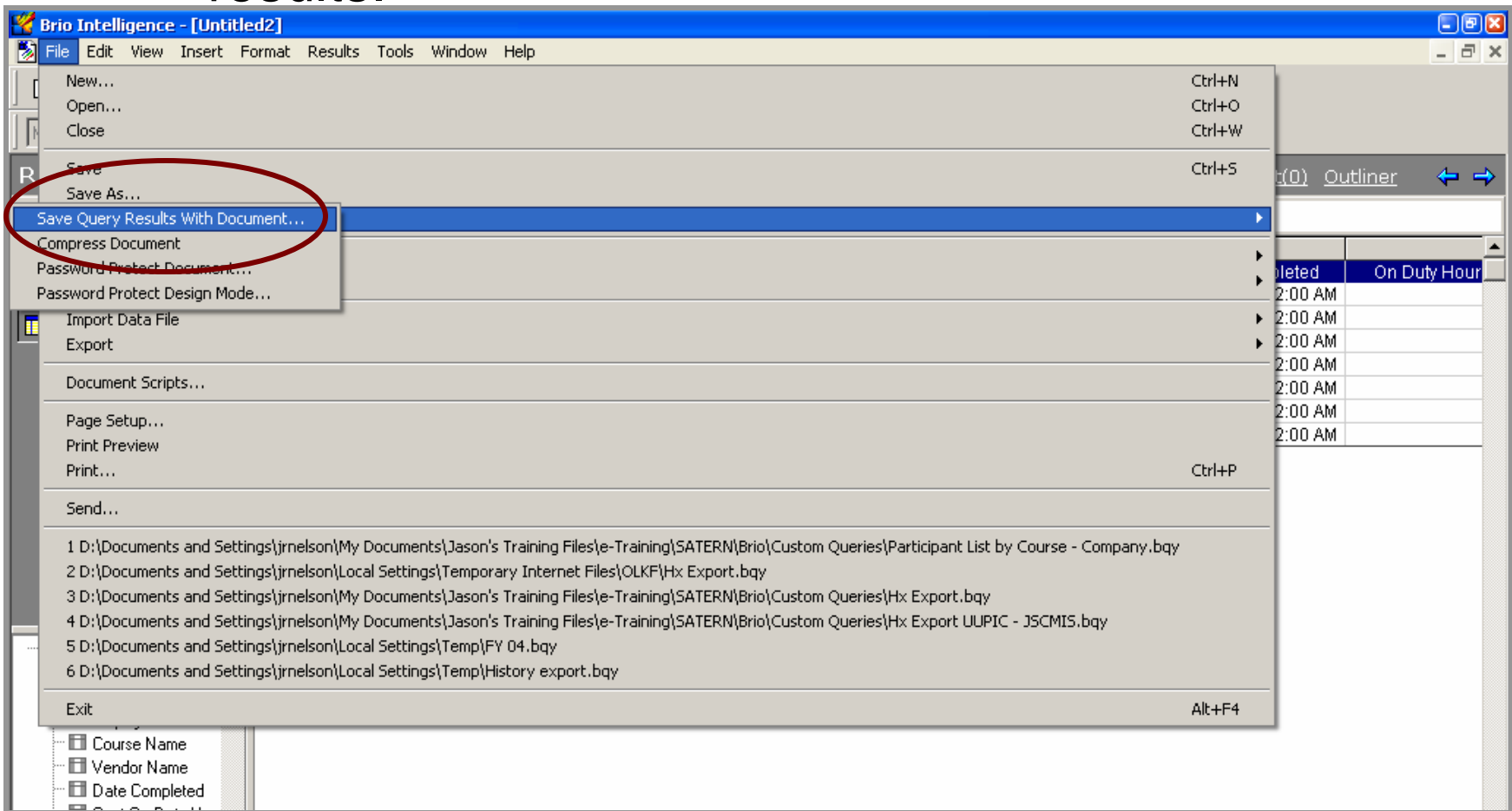
Exercise 2:

Saving a Report in Brio



Exercise 2: Saving a Report in Brio

Step 1: Click File > Save Options > Save Query Results With Document to save both the query and the results.



Exercise 2: Saving a Report in Brio

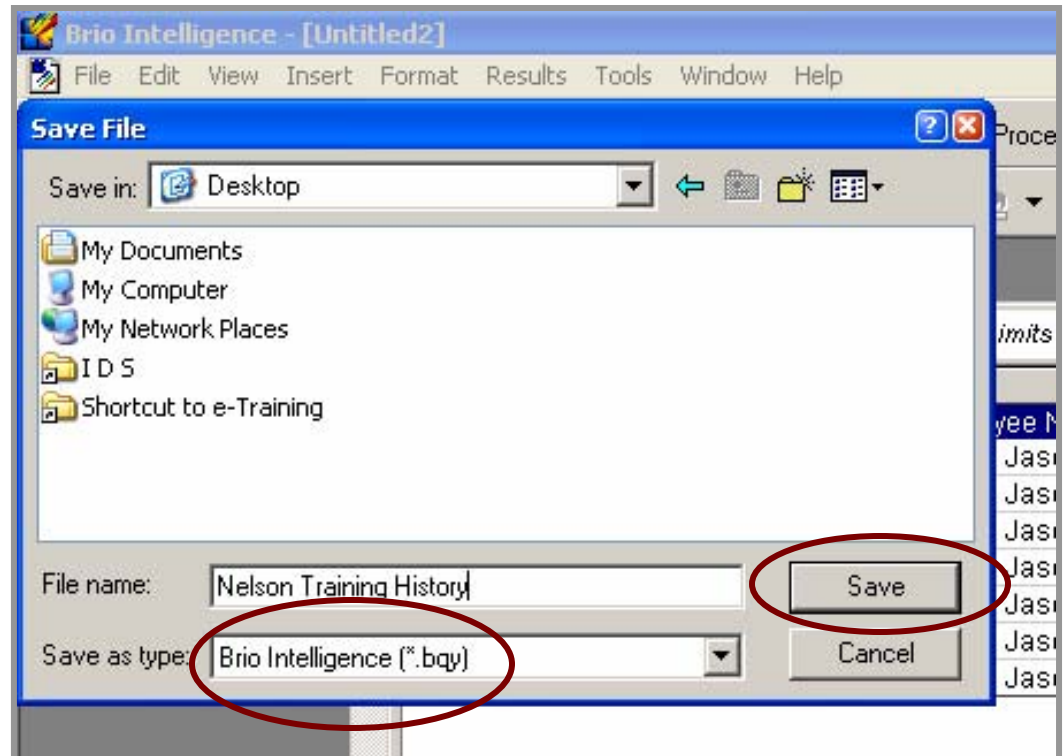
Step 2: Check the boxes for both Query and Results.
Click OK.

The screenshot shows the Brio Intelligence interface. The main window displays a report with the following data:

	Center Name	Org ID	Employee Name	Course Name	Vendor Name	Date Completed	On Duty Hour
1	JSC	JSC-AH311	Nelson, Jason	ITS-002-04: Basic IT Security fo		02/28/05 12:00 AM	
2	JSC	JSC-AH311	Nelson, Jason	ITS-003-05: Basic IT Security fo		03/30/06 12:00 AM	
3	JSC	JSC-AH311	Nelson, Jason	ITS-010-02: Basic IT Security fo		09/12/03 12:00 AM	
4	JSC	JSC-AH311	Nelson, Jason	ITS-012-03: Basic IT Security fo		02/27/04 12:00 AM	
5	JSC	JSC-AH311	Nelson, Jason	JSC-001-04: Annual Security R		11/01/04 12:00 AM	
6	JSC	JSC-AH311	Nelson, Jason	JSC-003-03: Annual Security R		01/07/04 12:00 AM	
7	JSC	JSC-AH311	Nelson, Jason	JSC-004-05: JSC 2005 Annual		01/03/06 12:00 AM	

Overlaid on the bottom right is a dialog box titled "Save Query Results With Document". It contains two sections: "Query Results" and "Computed Columns". Both sections have a checkbox that is checked and circled in red. The "Query Results" checkbox is labeled "Query" and the "Computed Columns" checkbox is labeled "Results". The dialog also has "OK", "Cancel", and "Help" buttons.

Step 3: Click **File > Save As...**



Then, name and **Save** file
as a (*.bqy) type.



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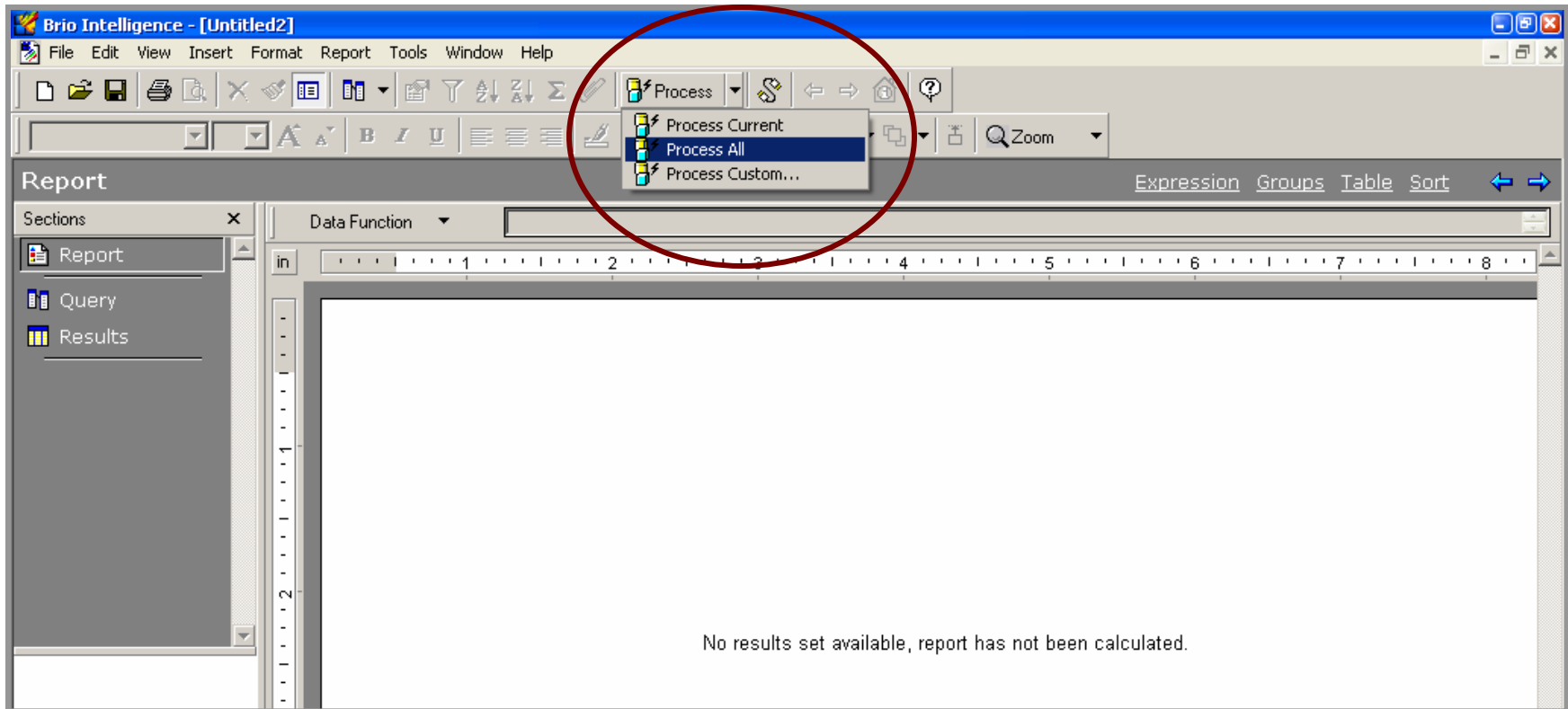
Exercise 3:

Training History by Organization



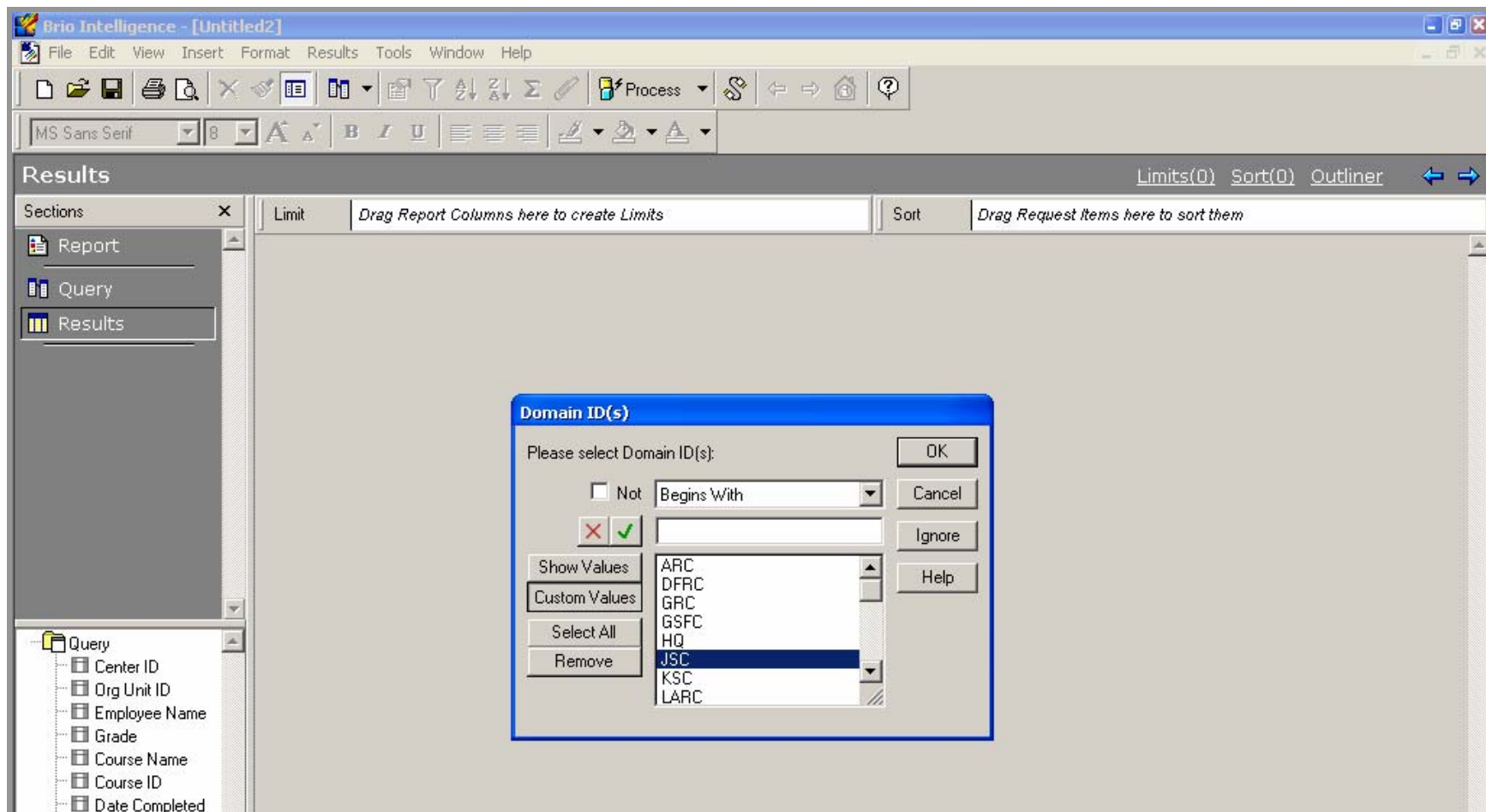
Exercise 3: Training History by Organization

Step 1: Click on Process pull down menu and select Process All.



Exercise 3: Training History by Organization

Step 2: Select your Domain ID. Click OK.



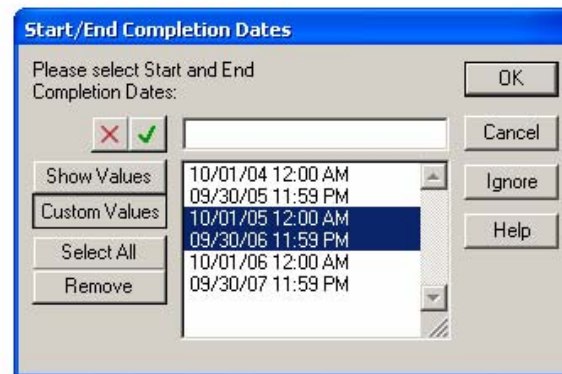
Step 3: Select Start/End Completion Dates.

- To get a complete history, do not enter any dates.

Instead, click **Ignore**.

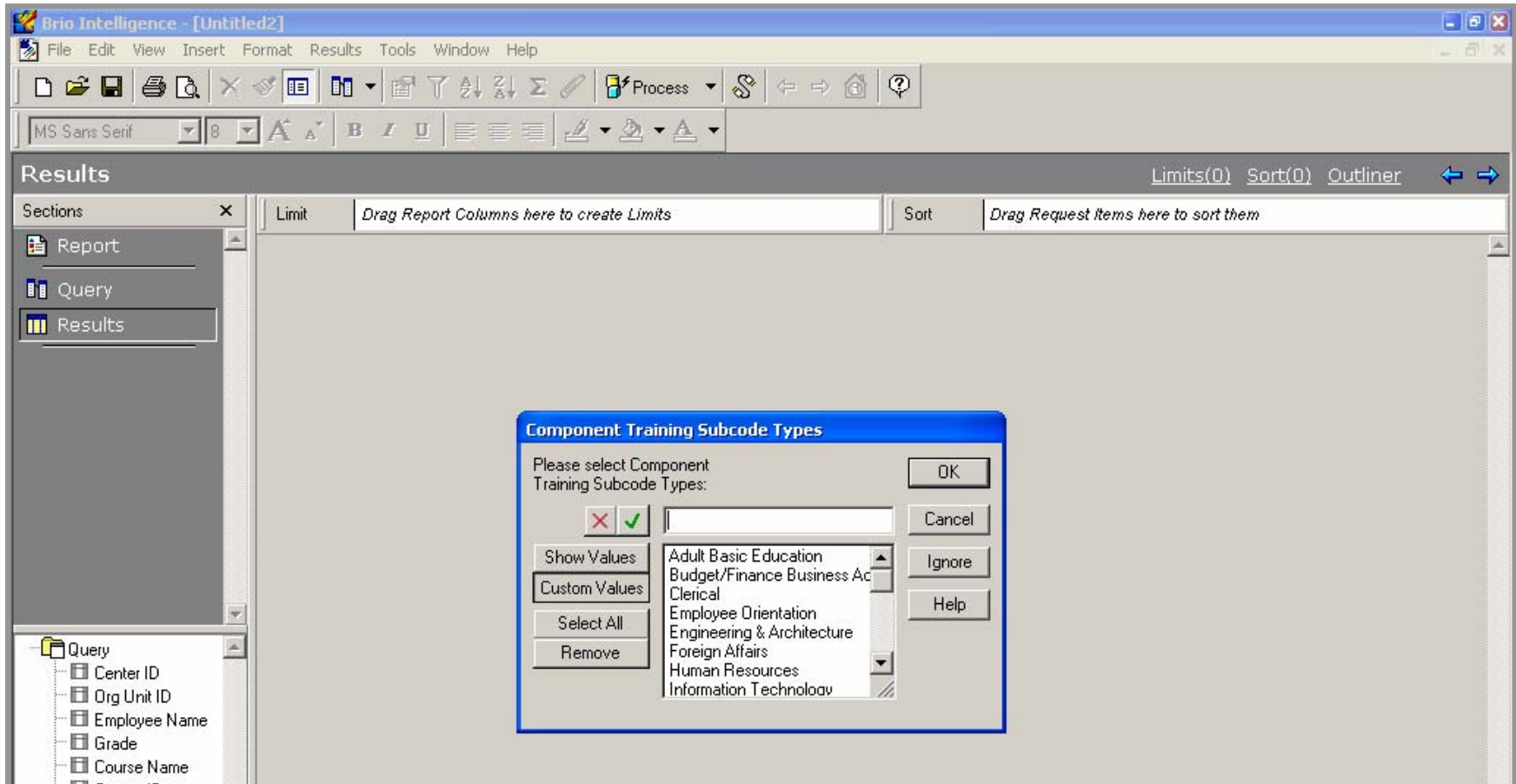
- To limit the report by date:

- Type the start date, and click the green check.
- Type the end date, and click the green check.
- Click **Select All**. Click **OK**.



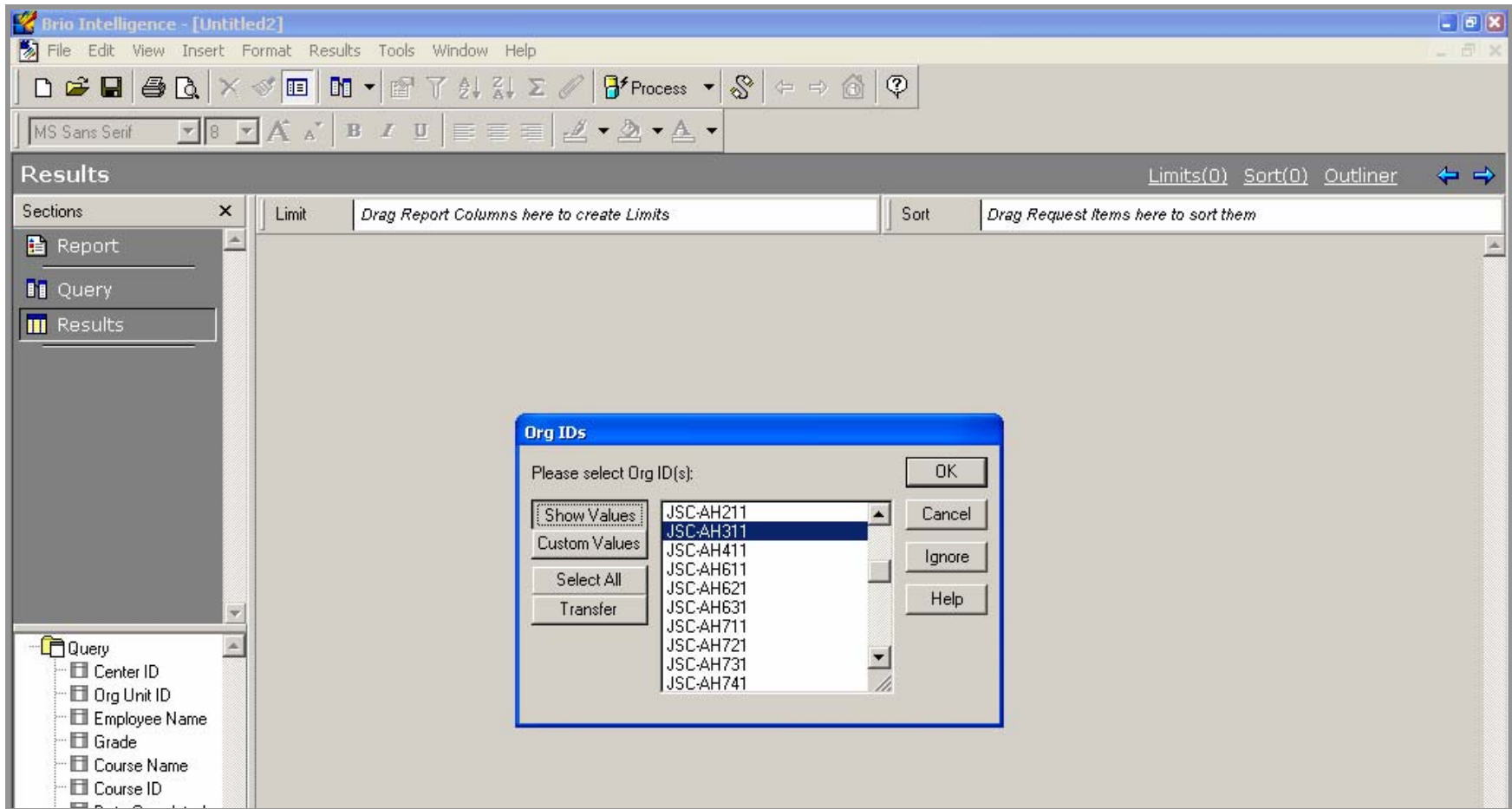
Exercise 3: Training History by Organization

Step 4: Click **Ignore** for the Training Type SubCode for both Component and Schedule.



Exercise 3: Training History by Organization

Step 5: Click **Show Values** to see a list of Org ID's.
Select the Org ID, and click **OK**.



Exercise 3: Training History by Organization

Step 6: Click **Results** to see the results in a table.

Brio Intelligence - [Untitled2]

File Edit View Insert Format Results Tools Window Help

Results Limits(0) Sort(0) Outliner

Sections

- Report
- Query
- Results**

	Center ID	Org Unit ID	Employee Name	Title	Category	Course Name	Course ID	Date Completed	Success
32	JSC	JSC-AH311	Anderson, Susan H.	Non-Supervisc		WRITING THAT	NONE	08/24/1993	
33	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		ANNUAL ETHIC	ETHICS	03/06/1996	
34	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		BASIC EXCEL 5	TCS5500	08/16/1994	
35	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		BASIC WINDOW	TCS5000	08/08/1994	
36	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		BASIC WORD 6	TCS5200	08/15/1994	
37	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		Basic IT Securib	ITS-001-01	08/07/2001	
38	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		Basic IT Securib	ITS-001-02	05/23/2002	
39	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		Basic IT Securib	ITS-010-02	04/14/2003	
40	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		Basic IT Securib	ITS-002-04	03/14/2005	
41	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		Basic IT Securib	ITS-003-05	12/28/2005	
42	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		CAREER ASSE	NSC0606	04/27/1995	
43	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		DIVERSITY FOR	NONE	07/23/1993	
44	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		HIV/AIDS TRAIN	ZHIVO	09/28/1994	
45	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		IMPORTANCE C	NCI6522	10/07/1994	
46	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		INTERM. WIND	TCS5100	08/09/1994	
47	JSC	JSC-AH311	Anderson, Susan J.	Non-Supervisc		Information Tool	ITS-002-00	11/17/1999	



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Exercise 4:

Limiting and Sorting



How to Limit Data

Let's use limits to determine who in JSC-AH3 has taken the following courses:

- Basic IT Security for 2006
- Root Cause Analysis

Exercise 4: Limiting and Sorting

Step 1: Click and drag the Course Name column to the Limit field.

The screenshot shows the Brio Intelligence interface. The 'Results' pane on the left contains a table with the following data:

	Center ID	Org Unit ID	Employee Name	Title	Category	Course Name	Course ID	Date Completed	Su
32	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		MANAGING MGMT	NONE	10/28/1977	
33	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		INTRO TO SOCI	NONE	12/19/1977	
34	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		SEC PROF DEV	NONE	02/24/1978	
35	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		14TH COOP ED	NONE	04/13/1978	
36	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		TRANSACTION/	NONE	04/14/1978	
37	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		CAREER DVLP	NONE	05/10/1978	
38	JSC	JSC-AH311	Kochner, John	Non-Supervisc		PERSONNEL IN	NONE	05/18/1978	
39	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		CAREER PLANI	NONE	07/07/1978	
40	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		TRAVEL TRAINI	NONE	09/12/1978	
41	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		RECORDS MGMT	NONE	09/21/1978	
42	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		PERSONAL DE'	NONE	12/27/1978	
43	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		PERSONAL DE'	NONE	12/29/1978	
44	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		26TH ANNUAL	NONE	02/23/1979	
45	JSC	JSC-AH311	Kochner, John	Non-Supervisc		LABOR RELATIO	NONE	03/29/1979	
46	JSC	JSC-AH311	Kochner, John	Non-Supervisc		COPING WITH	NONE	04/20/1979	
47	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		15TH INTR CON	NONE	04/20/1979	

Step 2: Click Show Values

- Hold the **CTRL** key while selecting the courses from the list.
- Once you have selected all of the courses, click **OK**.

The screenshot shows a data application window titled 'Brio Intelligence - [Untitled]'. The main area displays a table with columns: Center ID, Org Unit ID, Employee Name, Title, Category, Course Name, Course ID, and Date Completed. The table contains data for various employees and their associated courses. A dialog box titled 'Limit: Course Name' is open, showing a list of course names. The 'Show Values' button is circled in red. The dialog also includes options for 'Include Nulls', 'Not', and 'Equal', along with buttons for 'OK', 'Cancel', 'Ignore', 'Help', and 'Options'.

	Center ID	Org Unit ID	Employee Name	Title	Category	Course Name	Course ID	Date Completed
32	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		MANAGING MGMT	NONE	10/28/1977
33	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		INTRO TO SOCI	NONE	12/19/1977
34	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		SEC PROF DEV	NONE	02/24/1978
35	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		14TH COOP ED	NONE	04/13/1978
36	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		TRANSACTIONAL	NONE	04/14/1978
37	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		CAREER DVLP	NONE	05/10/1978
38	JSC	JSC-AH311	Koehn, David	Non-Supervisc		PERSONNEL IN	NONE	05/18/1978
39	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		CAREER PLANI	NONE	07/07/1978
40	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		TRAVEL TRAINI	NONE	09/12/1978
41	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		RECORDS MGMT	NONE	09/21/1978
42	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		PERSONAL DEV	NONE	12/27/1978
43	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		PERSONAL DEV	NONE	12/29/1978
44	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		26TH ANNUAL	NONE	02/23/1979
45	JSC	JSC-AH311	Koehn, David	Non-Supervisc		LABOR RELATIO	NONE	03/29/1979
46	JSC	JSC-AH311	Koehn, David	Non-Supervisc		COPING WITH	NONE	04/20/1979
47	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		15TH INTR COM	NONE	04/20/1979
48	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		SPEAKING UP	NONE	05/02/1979
49	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		WKSHP-RECRU	NONE	09/20/1979
50	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		BUSINESS PRI	NONE	12/15/1979
51	JSC	JSC-AH311	Koehn, David	Non-Supervisc		MANAGERIAL B	NONE	02/29/1980
52	JSC	JSC-AH311	Williams, Clarence	Non-Supervisc		PERSONAL + P	NONE	03/07/1980
53	JSC	JSC-AH311	Lockhart, Freda	Non-Supervisc		TIME AND ATTE	NONE	03/14/1980
54	JSC	JSC-AH311	Humphrey, Niesje L.	Non-Supervisc		TIME AND ATTE	NONE	03/14/1980

Exercise 4: Limiting and Sorting

The **Limit** function places a filter on the results.

Brio Intelligence - [Training Hx by Org.bqy]

File Edit View Insert Format Results Tools Window Help

Process

Results Limits(1) Sort(1) Outliner

Sections

- Report
- Query
- Results

Limit Course Name

Sort Course Name

	Center ID	Org Unit ID	Employee Name	Grade	Title	Category	Course Name
1	JSC-AH	JSC-AH311	Anderson, Susan J.	GS-11	Non-Supervisor		Basic IT Security for 2006
2	JSC-Cc	JSC-AH311	Demaret, Priscilla P.		Non-Supervisor		Basic IT Security for 2006
3	JSC-Cc	JSC-AH311	Finberg, Irina B.		Non-Supervisor		Basic IT Security for 2006
4	JSC-Cc	JSC-AH311	Grant, Greg		Non-Supervisor		Basic IT Security for 2006
5	JSC-Cc	JSC-AH311	Irina, Ivensky G.		Non-Supervisor		Basic IT Security for 2006
6	JSC-Cc	JSC-AH311	Kuchinski, Diane		Non-Supervisor		Basic IT Security for 2006
7	JSC-Cc	JSC-AH311	Mintz, Cheryl L.		Non-Supervisor		Basic IT Security for 2006
8	JSC-Cc	JSC-AH311	Mucha, Wacław J.		Non-Supervisor		Basic IT Security for 2006
9	JSC-Cc	JSC-AH311	Rostova, Natalia A.		Non-Supervisor		Basic IT Security for 2006
10	JSC-Cc	JSC-AH311	Watson, Jeff R.		Non-Supervisor		Basic IT Security for 2006
11	JSC-Cc	JSC-AH311	Davdova, Elena A.		Non-Supervisor		Basic IT Security for 2006
12	JSC-Cc	JSC-AH311	Williams, Terri D.		Non-Supervisor		Basic IT Security for 2006
13	JSC-Cc	JSC-AH311	Bauman, Olga A.		Non-Supervisor		Basic IT Security for 2006
14	JSC-AH	JSC-AH311	Nowinski, James J.	GS-13	Non-Supervisor		Basic IT Security for 2006
15	JSC-AH	JSC-AH311	Collins, Michael W.	GS-12	Non-Supervisor		Basic IT Security for 2006
16	JSC-AH	JSC-AH311	Cruz, Pablo	GS-11	Non-Supervisor		Basic IT Security for 2006
17	JSC-AH	JSC-AH311	DeCherment, Kelly J.	GS-11	Non-Supervisor		Basic IT Security for 2006
18	JSC-AH	JSC-AH311	Vandersand, Erica W.	GS-13	Non-Supervisor		Basic IT Security for 2006
19	JSC-Cc	JSC-AH311	Wright, Tammie L.		Non-Supervisor		Basic IT Security for 2006
20	JSC-AH	JSC-AH311	Garrick, Nancy A.	GS-13	Non-Supervisor		Basic IT Security for 2006
21	JSC-AH	JSC-AH311	Henderson, Andrea C.	GS-09	Non-Supervisor		Basic IT Security for 2006
22	JSC-AH	JSC-AH311	Nelson, Jason R.	GS-09	Non-Supervisor		Basic IT Security for 2006
23	JSC-AH	JSC-AH311	Elliott, Kelly A.	GS-13	Non-Supervisor		Basic IT Security for 2006
24	JSC-AH	JSC-AH311	Decker, Stacey R.	GS-12	Non-Supervisor		ROOT CAUSE ANALYSIS
25	JSC-AH	JSC-AH311	Denton-Misfeldt, Deborah L.	GS-14	Supervisor		ROOT CAUSE ANALYSIS

Query

- Center ID
- Org Unit ID
- Employee Name
- Grade
- Course Name
- Course ID
- Date Completed
- Supervisory Code
- Sched Train Subcd
- Cpnt Train Subcd
- User Value SC

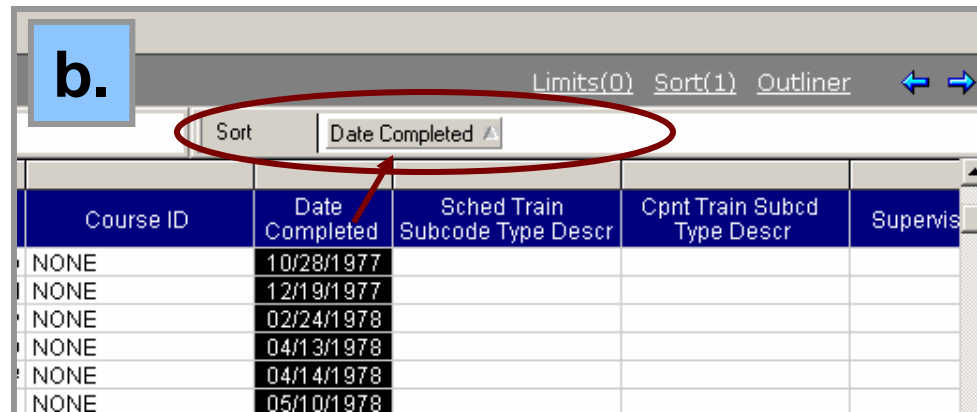
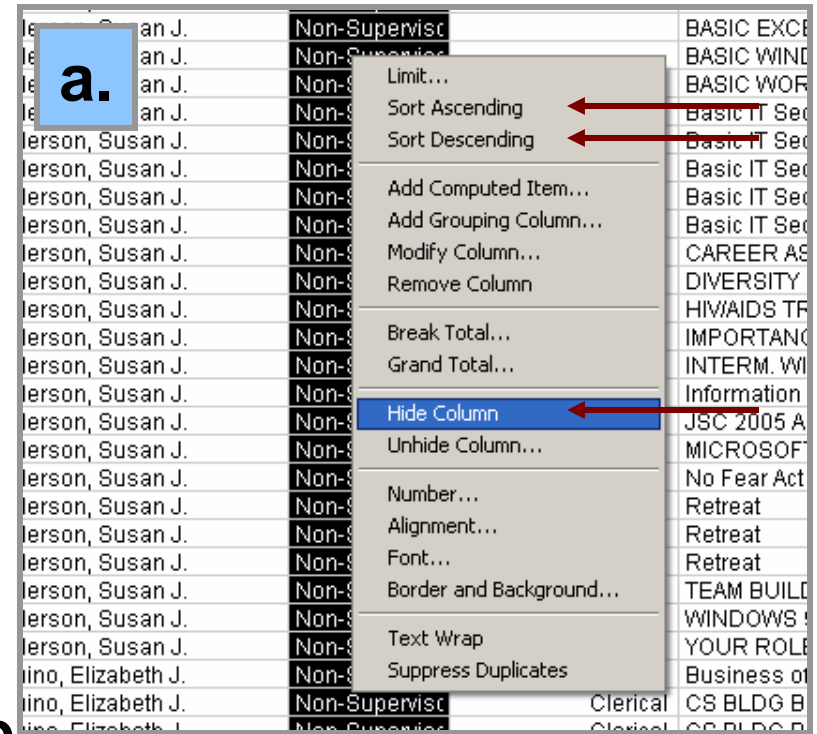
2 Ways to Sort Data:

a. Right click on a column to:

- Sort Ascending
- Sort Descending
- Hide column

Or

b. click and drag a column the Sort field:





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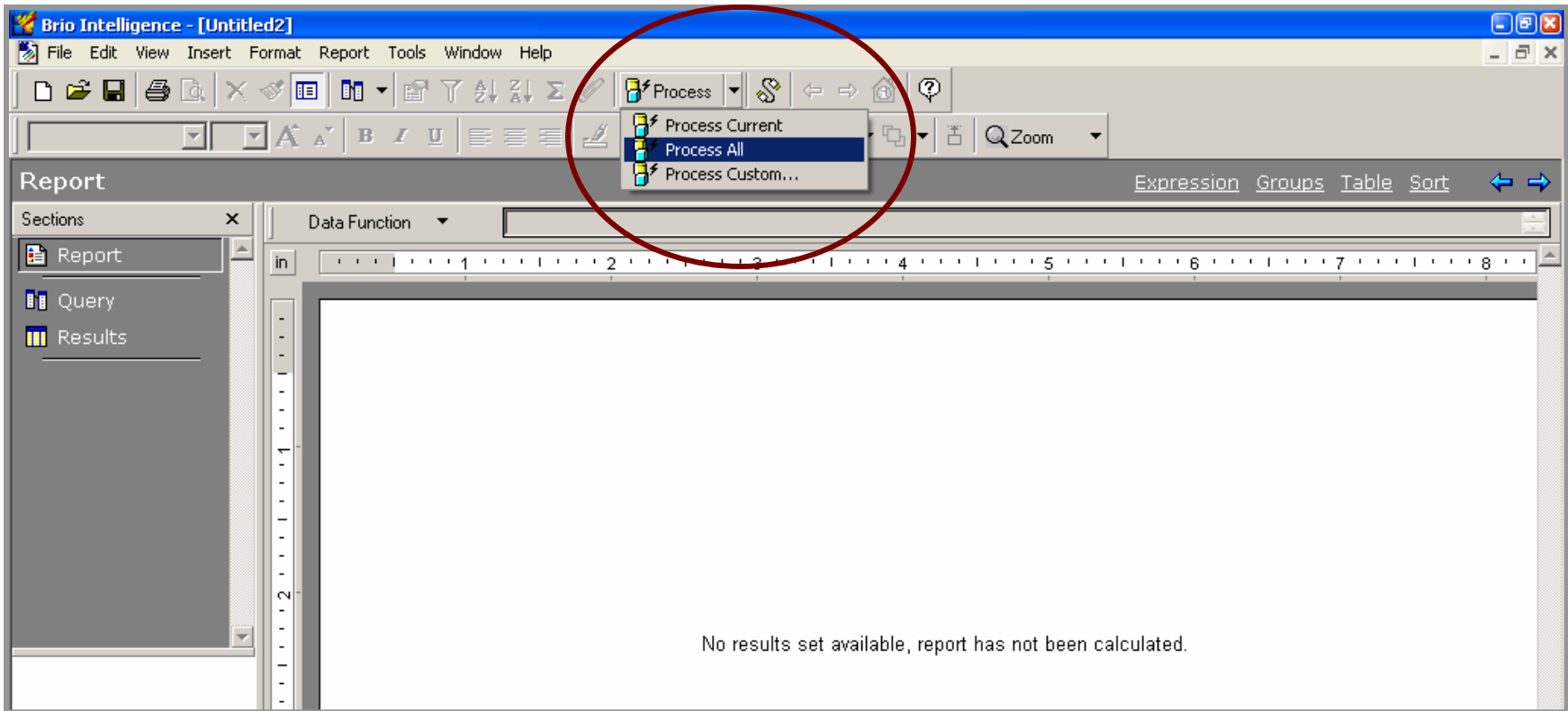
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Exercise 5:

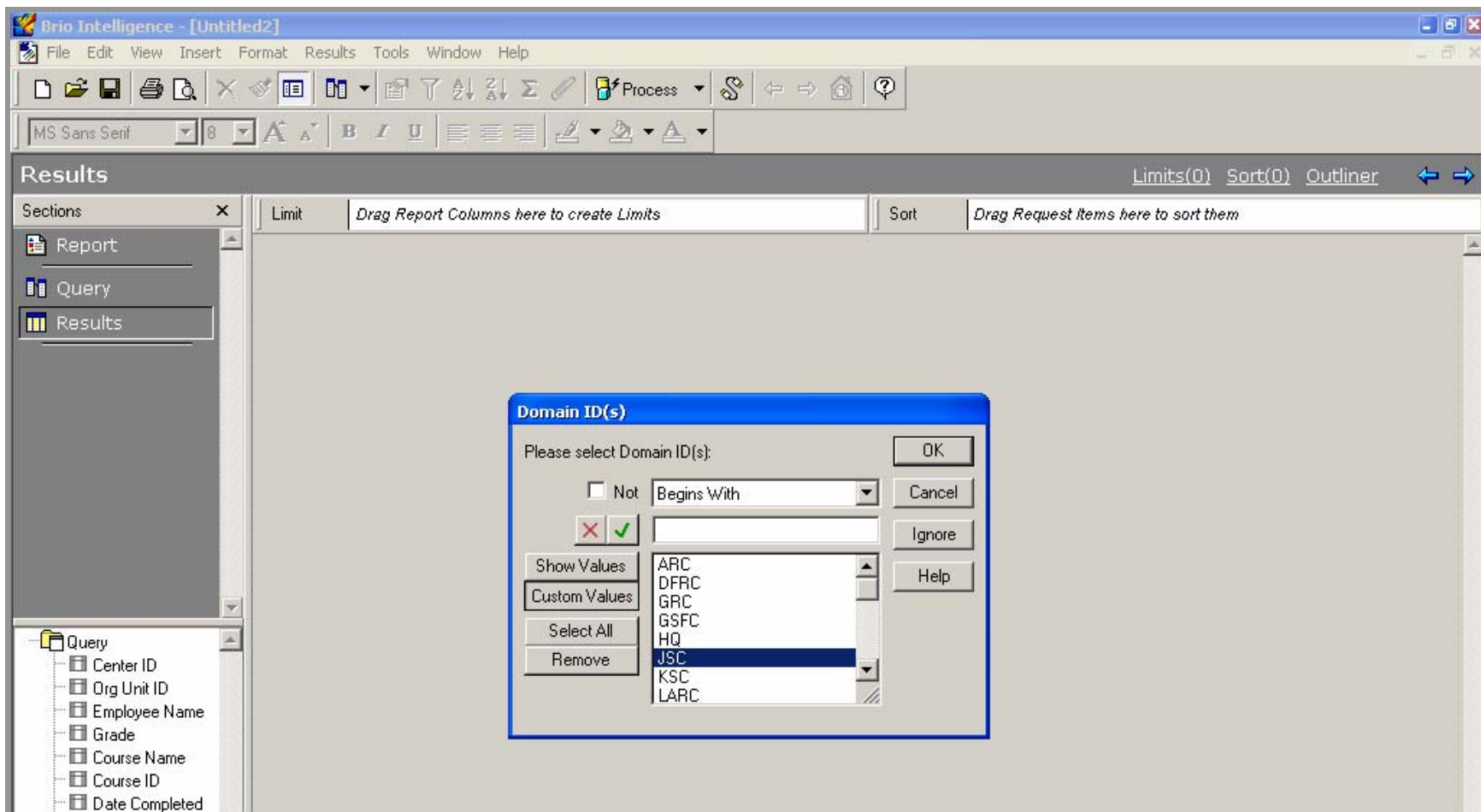
History Export



Step 1: Click on **Process** pull down menu and select **Process All**.



Step 2: Select your Domain ID. Click OK.



Step 3: Excluded Org IDs, Click OK.

The screenshot shows the Brio Intelligence software interface. The main window is titled "Brio Intelligence - [Hx Export.bqy]". The menu bar includes File, Edit, View, Insert, Format, Query, DataModel, Tools, Window, and Help. The toolbar contains various icons for file operations, editing, and querying. The main area is divided into sections: "Query" and "Results". The "Query" section shows a list of fields: Student ID, Lastname, Firstname, Middle, Termination Date, Domain ID Current, Org ID Current, Domain ID Hx, Org ID Hx, Location ID, Mailcode, Sex, Ethnic Origin, Handicap Code, NCC, Pay Plan Pay Grade, Position Type, Position Type Desc, Supervisory Status, Supervisory Status Desc, and Component ID. The "Results" section shows a list of fields: Row Num, Cmnt Id, Cmnt Typ Id, Rev Dte, Cmnt Stat Id, BT, Cmnt Dte, Stud Id, Schd Id, Credit Hrs, and Inst Name. A dialog box titled "Excluded Org IDs" is open, prompting the user to select Org ID(s) to exclude. The dialog includes a "Please select Org ID(s) to exclude:" label, a "Not" checkbox, a dropdown menu set to "Equal", and a list of organization IDs: ARC-CONTRACTOR, ARC-NNCS, DFRC-CONTRACTOR, DFRC-NNCS, GRC-CONTRACTOR, GRC-NNCS, and GSFC-CONTRACTOR. The "OK" button is highlighted.

Query

Request(85) Limits(5) Sort(0)

Sections

Query

Results

Sort

Drag Request Items here to sort them

Limit

Dmn Id V(1) AND Org Id V(2) AND Cmpl Dte V(3) AND Rec Source V(4) AND Col Num

Request

Student ID Lastname Firstname Middle Termination Date Domain ID Current Org ID Current Domain ID Hx Org ID Hx Location ID Mailcode Sex

Ethnic Origin Handicap Code NCC Pay Plan Pay Grade Position Type Position Type Desc Supervisory Status Supervisory Status Desc Component ID

Gp Learner Evthst

Row Num

Cmnt Id

Cmnt Typ Id

Rev Dte

Cmnt Stat Id

BT

Cmnt Dte

Stud Id

Schd Id

Credit Hrs

Inst Name

Pa Stud User

Col Num

Stud Id

User Value

Lst Upd Usr

Lst Upd Tstmp

Excluded Org IDs

Please select Org ID(s) to exclude:

☒ Not ☐ Equal

Show Values

Custom Values

Select All

Remove

* Include All Orgs

ARC-CONTRACTOR

ARC-NNCS

DFRC-CONTRACTOR

DFRC-NNCS

GRC-CONTRACTOR

GRC-NNCS

GSFC-CONTRACTOR

OK

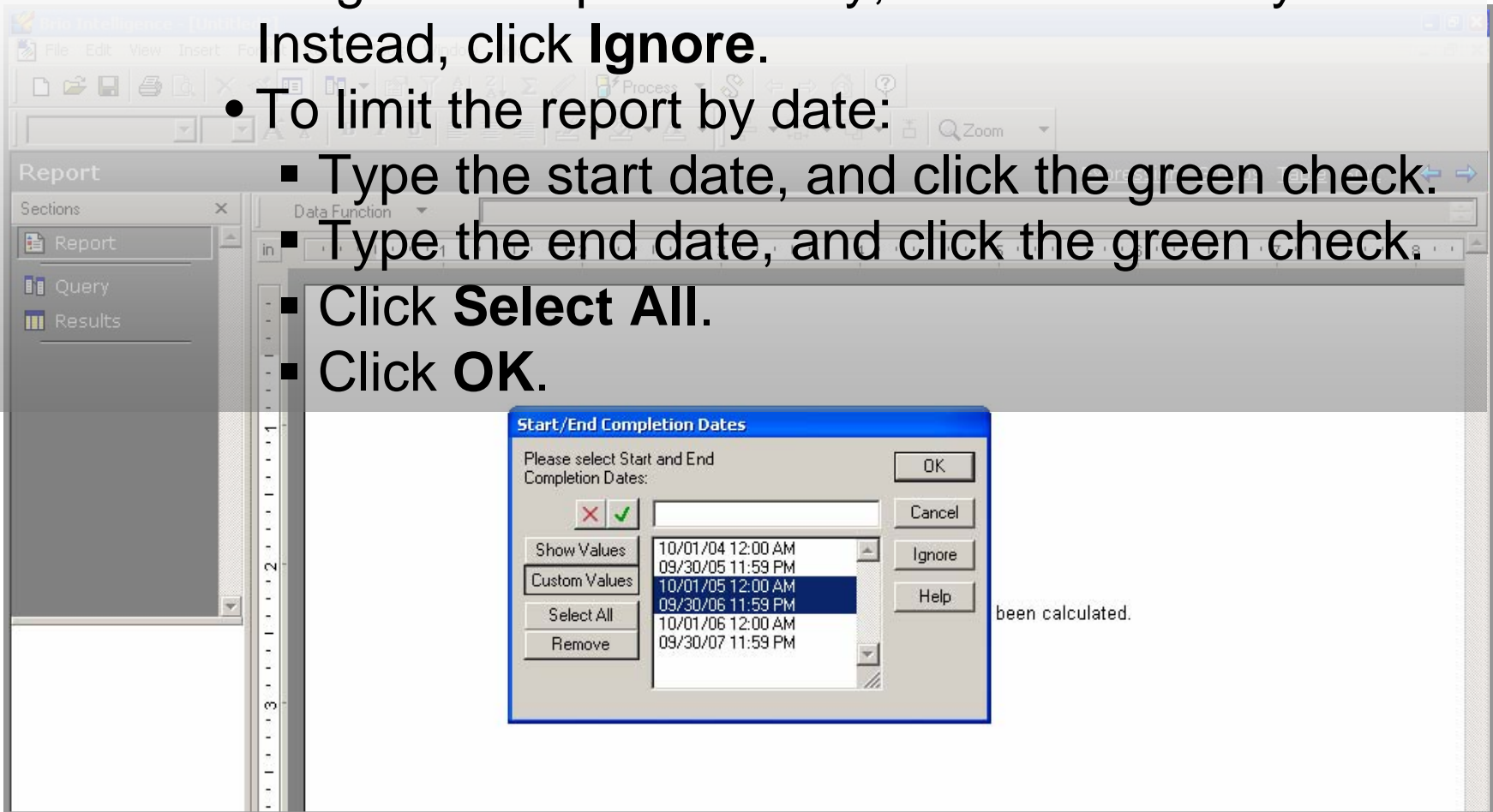
Cancel

Ignore

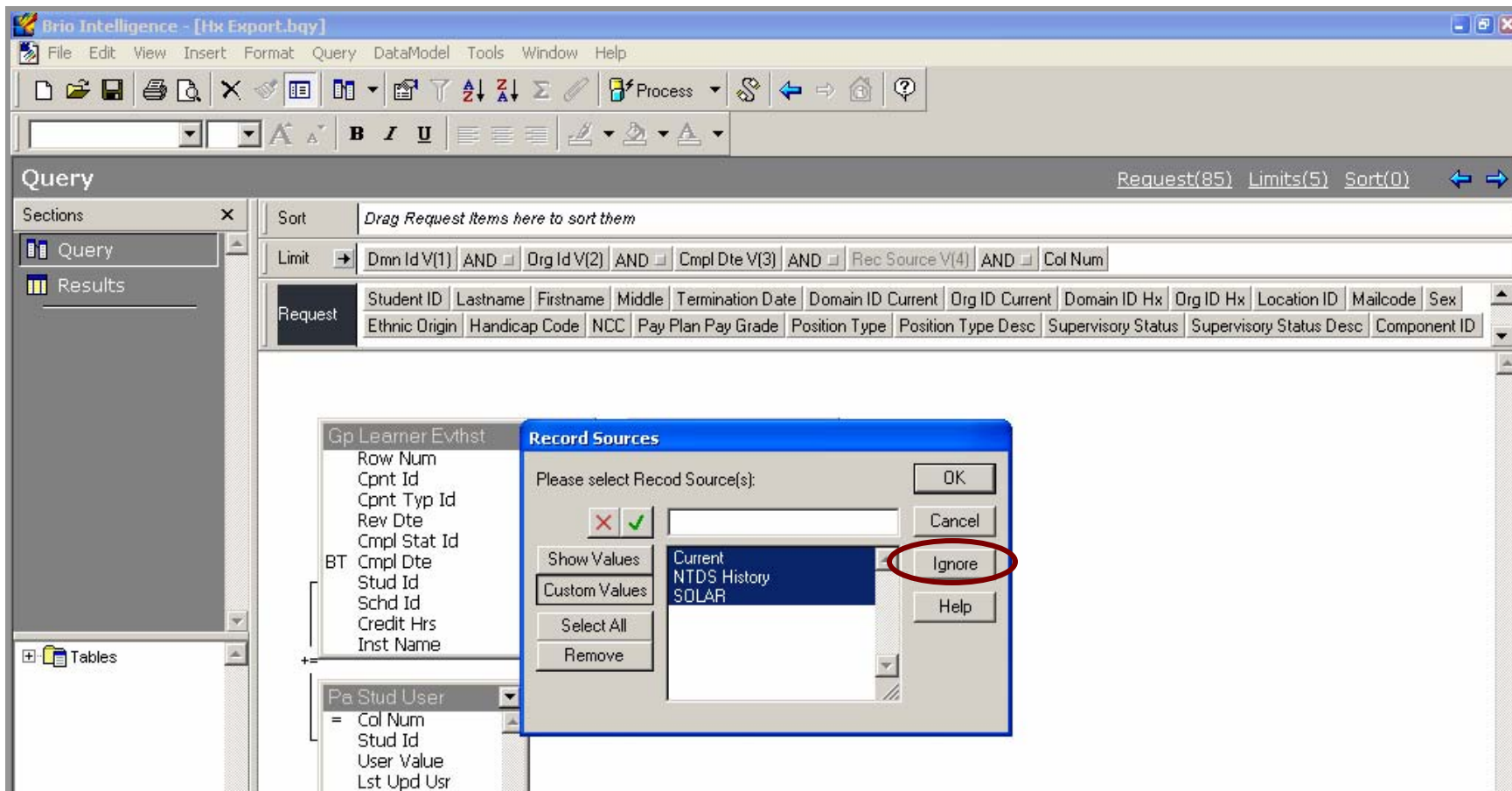
Help

Step 4: Select Start/End Completion Dates.

- To get a complete history, do not enter any dates. Instead, click **Ignore**.
- To limit the report by date:
 - Type the start date, and click the green check.
 - Type the end date, and click the green check.
 - Click **Select All**.
 - Click **OK**.



Step 5: Click Ignore.



Exercise 5: History Export

Step 6: Click **Outliner** to view all data fields in the report.
Re-order columns by clicking the field and dragging to the desired position.

Brio Intelligence - [Hx Export.bqy]

File Edit View Insert Format Results Tools Window Help

Process

Results Limits(0) Sort(1) **Outliner**

Sections

Query

Results

Limit Drag Report Columns here to create Limits

Sort Component ID

	Student ID	Lastname	Firstname	Middle	Termination Date	Domain ID Current	Domain ID Hx	Org ID Current	Org ID Hx	Location ID	Mailcode	Sex
1	C-drgarcia	Garcia	Diana	R		JSC-Conf	JSC-Cor	JSC-RF111	JSC-RF111	JSC-NA		
2	tchong1	HONG	TODD	C		JSC-N	JSC-N	JSC-NT411	JSC-NT411	JSC-NT411	JSC-NT411	M
3	dwmoreland	MORELAND	DEAN	W		JSC-N	JSC-N	JSC-NE121	JSC-NE121	JSC-NE121	JSC-NE121	M
4	cdlaverne	LAVERNE	CAROL	D		JSC-J	JSC-J	JSC-JM411	JSC-JM411	JSC-JM411	JSC-JM411	F
5	C-gelovstuei	Lovstuen	Gary	E		JSC-Conf	JSC-Cor	GSFC-1800	GSFC-1800	JSC-OD111		
6	ldstrassner	STRASSNER	LIZ	D		JSC-E	JSC-E	JSC-ER611	JSC-ER211	JSC-ER211	JSC-ER211	F
7	rkbaccus	BACCUS	RONALD	K		JSC-E	JSC-E	JSC-ES211	JSC-ES511	JSC-ES511	JSC-ES511	M
8	dwmoreland	MORELAND	DEAN	W		JSC-N	JSC-N	JSC-NE121	JSC-NE121	JSC-NE121	JSC-NE121	M
9	C-pahoffmar	Hoffman	Patricia	A		JSC-Conf	JSC-Cor	JSC-SA111	JSC-SA111	JSC-SA111		
10	jamattheaus	MATTHEAUS	JULIE	A		JSC-N	JSC-N	JSC-NT311	JSC-NT311	JSC-NT311	JSC-NT311	F

Outliner

Student ID, Lastname, Firstname, Middle, Termination Date, Domain ID Current, Domain ID Hx, Org ID Current, Org ID Hx, Location ID, Mailcode, Sex, Ethnic Origin, Handicap Code, NCC, Pay Plan Pay Grade, Position Type, Position Type Desc, Supervisory Status, Supervisory Status Desc, F, Component ID, Component Title, Num of Days, Self Study, Date Completed, Date Scheduled, Subject, Instructor Name, Contact, Vendor Code, Vendor Name, On Duty Hours, Off Duty Hours, Total Hours, Direct Cost Code, Direct Cost Code Desc, Books Material Cos, Participant Cos, Other Direct Cos, Total Direct Cos, Indirect Cost Code, Indirect Cost Code Desc, Total Indirect Cos, Grade, ACL, ACC Desc, Credit Hrs, Fo Number, Course Count, Training Code, Training Code Desc, Component Type, POC, Source of Training, Source of Training Desc, Special Interest Code, Special Interest Desc, Category Code, Category Desc, Subcategory Code, Subcategory Desc, Funding Org, Created Date, Last Modified Date, Rec Source, UUPIC

20	tjolson1	OLSON	TRISHA	J		JSC-L	JSC-L	JSC-LO111	JSC-LO111	JSC-LO111	JSC-LO111	F
21	adparikh	PARIKH	ANAND	D		JSC-L	JSC-L	JSC-LS111	JSC-LS111	JSC-LS111	JSC-LS111	M
22	fkimhuirgh	NIMHIRGH	EIODHNA	K		JSC-L	JSC-L	JSC-LB111	JSC-LB111	JSC-LB111	JSC-LB111	F



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Exercise 6:

Pivot Tables

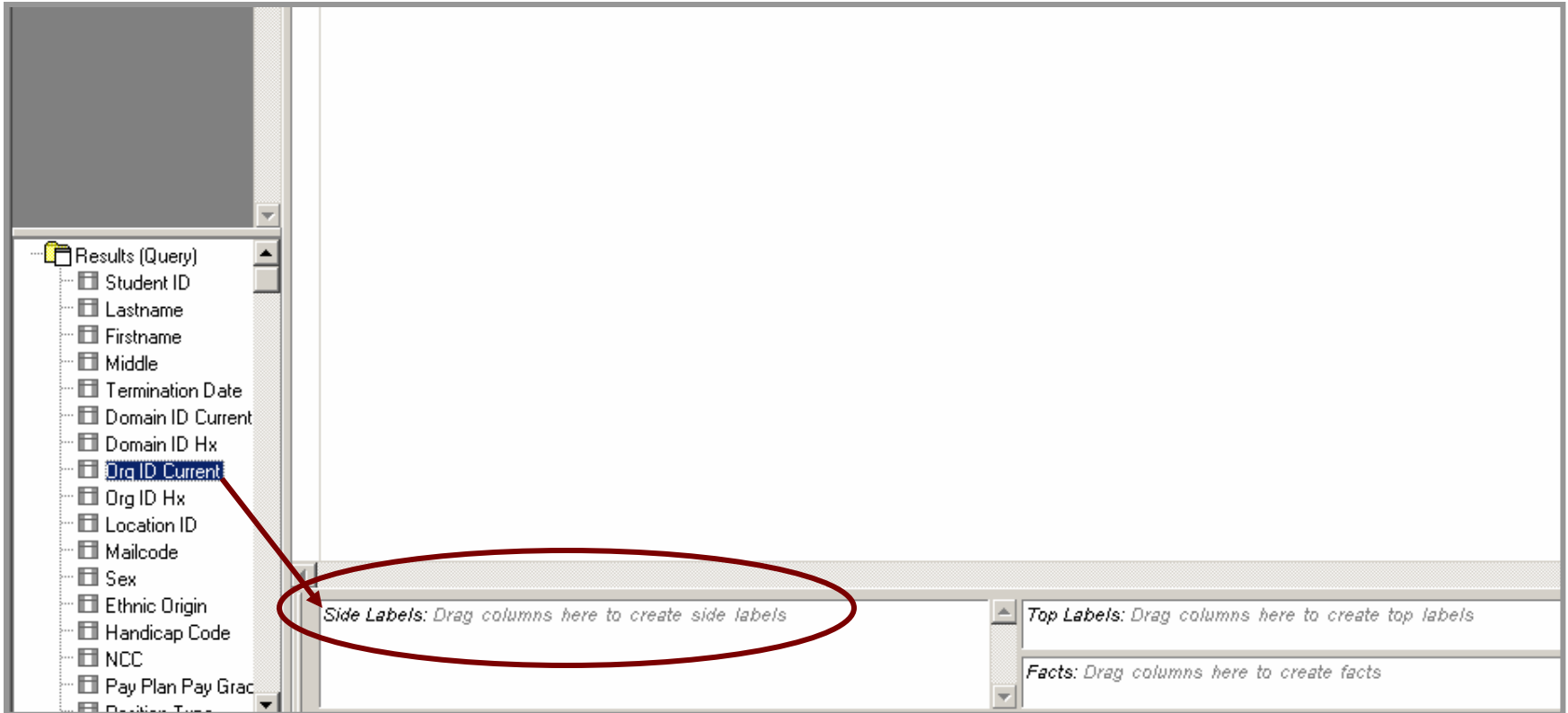


Step 1: Click Insert > New Pivot

The screenshot shows the Brio Intelligence [Hx Export.brio] application window. The 'Insert' menu is open, and 'New Pivot' is highlighted with a red circle. The 'Results' pane on the left shows a list of fields: Student ID, Lastname, Firstname, Middle, Termination Date, Domain ID Current, Domain ID Hx, Org ID Current, Org ID Hx, Location ID, Mailcode, and Sex. The main data table displays 19 rows of employee data.

	Student ID	Lastname	Firstname	Middle	Termination Date	Domain ID Current	Domain ID Hx	Org ID Current	Org ID Hx	Location ID	Mailcode	Sex
1	C-drgarcia	Garcia	Diana	R		JSC-Conf	JSC-Cor	JSC-RF111	JSC-RF111	JSC-NA		
2	tchong1	HONG	TODD	C		JSC-N	JSC-N	JSC-NT411	JSC-NT411	JSC-NT411	JSC-NT411	M
3	dwmoreland	MORELAND	DEAN	W		JSC-N	JSC-N	JSC-NE121	JSC-NE121	JSC-NE121	JSC-NE121	M
4	cdlaverne	LAVERNE	CAROL	D		JSC-J	JSC-J	JSC-JM411	JSC-JM411	JSC-JM411	JSC-JM411	F
5	C-gelovstuei	Lovstuen	Gary	E		JSC-Conf	JSC-Cor	GSFC-1800	GSFC-1800	JSC-OD111		
6	ldstrassner	STRASSNER	LIZ	D		JSC-E	JSC-E	JSC-ER611	JSC-ER211	JSC-ER211	JSC-ER211	F
7	rkbaccus	BACCUS	RONALD	K		JSC-E	JSC-E	JSC-ES211	JSC-ES511	JSC-ES511	JSC-ES511	M
8	dwmoreland	MORELAND	DEAN	W		JSC-N	JSC-N	JSC-NE121	JSC-NE121	JSC-NE121	JSC-NE121	M
9	C-pahoffmar	Hoffman	Patricia	A		JSC-Conf	JSC-Cor	JSC-SA111	JSC-SA111	JSC-SA111		
10	jamattheaus	MATTHEAUS	JULIE	A		JSC-N	JSC-N	JSC-NT311	JSC-NT311	JSC-NT311	JSC-NT311	F
11	calewis	LEWIS	CATHY	A		JSC-L	JSC-L	JSC-LI211	JSC-LI211	JSC-LI211	JSC-LI211	F
12	tvallen	ALLEN	TONDRA	V		JSC-I	JSC-I	JSC-IS111	JSC-IS111	JSC-IS111	JSC-IS111	F
13	jgarkinson	ARKINSON	JANET	G		JSC-B	JSC-B	JSC-BA111	JSC-BA111	JSC-BA111	JSC-BA111	F
14	scsloan	SLOAN	SANFORD	C		JSC-C	JSC-C	JSC-CC211	JSC-CC211	JSC-CC211	JSC-CC211	M
15	jrkite	KITE	JESSICA	R		JSC-O	JSC-O	JSC-OX111	JSC-OX111	JSC-OX111	JSC-OX111	F
16	pjbranch1	BRANCH	PAMELA	J		JSC-N	JSC-N	JSC-NT411	JSC-NT411	JSC-NT411	JSC-NT411	F
17	maswenson	SWENSON	MATTHEW	A		JSC-L	JSC-L	JSC-LI111	JSC-LI111	JSC-LI111	JSC-LI111	M
18	ljuljon	ULJON	LINDA	J		JSC-O	JSC-O	JSC-OB111	JSC-OB111	JSC-OB111	JSC-OB111	F
19	edallen	ALLEN	ERROL	D		JSC-L	JSC-L	JSC-LB111	JSC-LB111	JSC-LB111	JSC-LB111	M

Step 2: Drag and drop data elements you want to report on into the **Side Labels** field.



Step 3: Click and drag data elements to the **Facts** field to perform sum and other math functions.

In this example, we used a pivot table to determine total training expenditures by Org ID.

The screenshot displays a pivot table interface. On the left, a list of fields includes Vendor Name, On Duty Hours, Off Duty Hours, Total Hours, Direct Cost Code, Direct Cost Code C, Books Material Co, Participant Cost, Other Direct Cost, Total Direct Cost, Indirect Cost Code, Indirect Cost Code, Total Indirect Cost, Grade, ACC, ACC Desc, Credit Hrs, and Po Number. The 'Participant Cost' field is highlighted. A red arrow points from this field to the 'Facts' area at the bottom right, which is labeled 'Facts: Participant Cost'. The main area shows a table with Org IDs in the first column and their corresponding Participant Costs in the second column. The table is sorted by Org ID. The bottom status bar indicates '1533 rows used' and '1x183'.

Org ID	Participant Cost
GSFC-1800	
JSC-10000	
JSC-10111	
JSC-AC211	
JSC-AD111	
JSC-AG111	173
JSC-AH111	
JSC-AH311	83.33
JSC-AH711	83.33
JSC-AH811	83.33
JSC-AJ111	
JSC-AL111	
JSC-AP311	
JSC-BA111	104.17
JSC-BD111	263
JSC-BG111	
JSC-BH111	
JSC-BJ111	
JSC-BT111	
JSC-BV111	120
JSC-CA111	
JSC-CB111	312.5
JSC-CB121	
JSC-CC111	83.33



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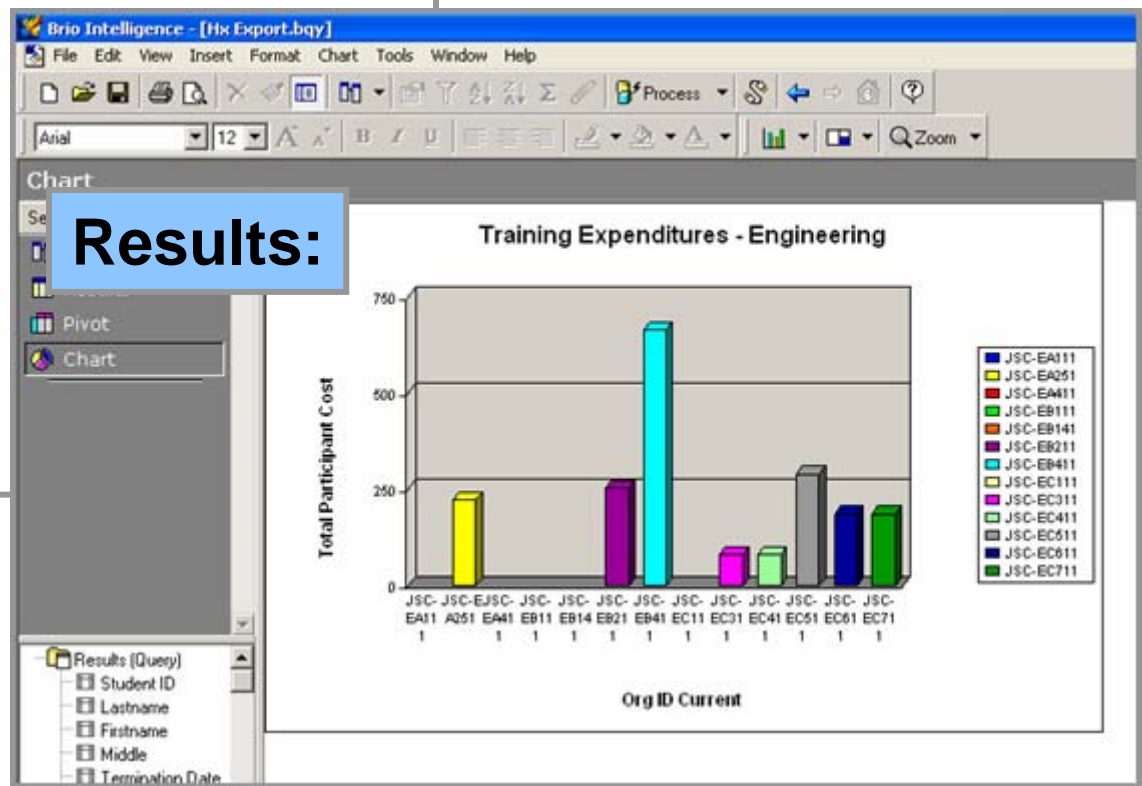
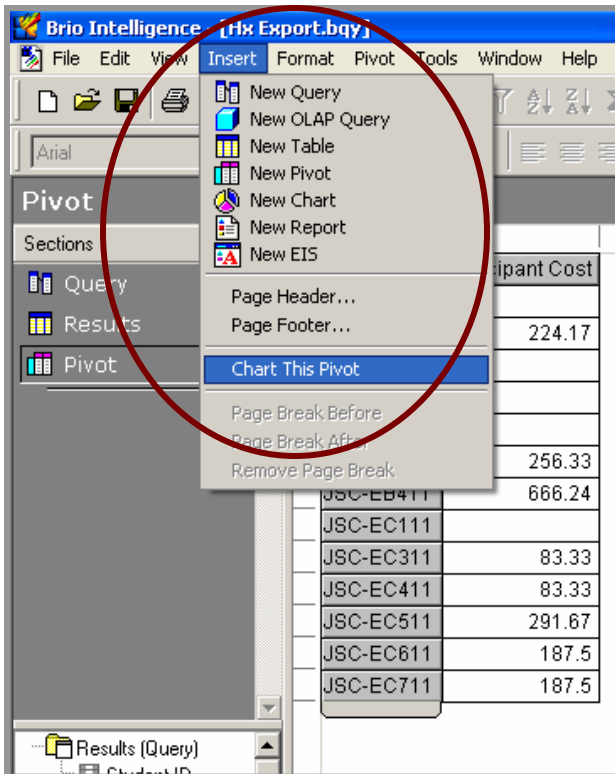
Exercise 7:

Charting and Graphing



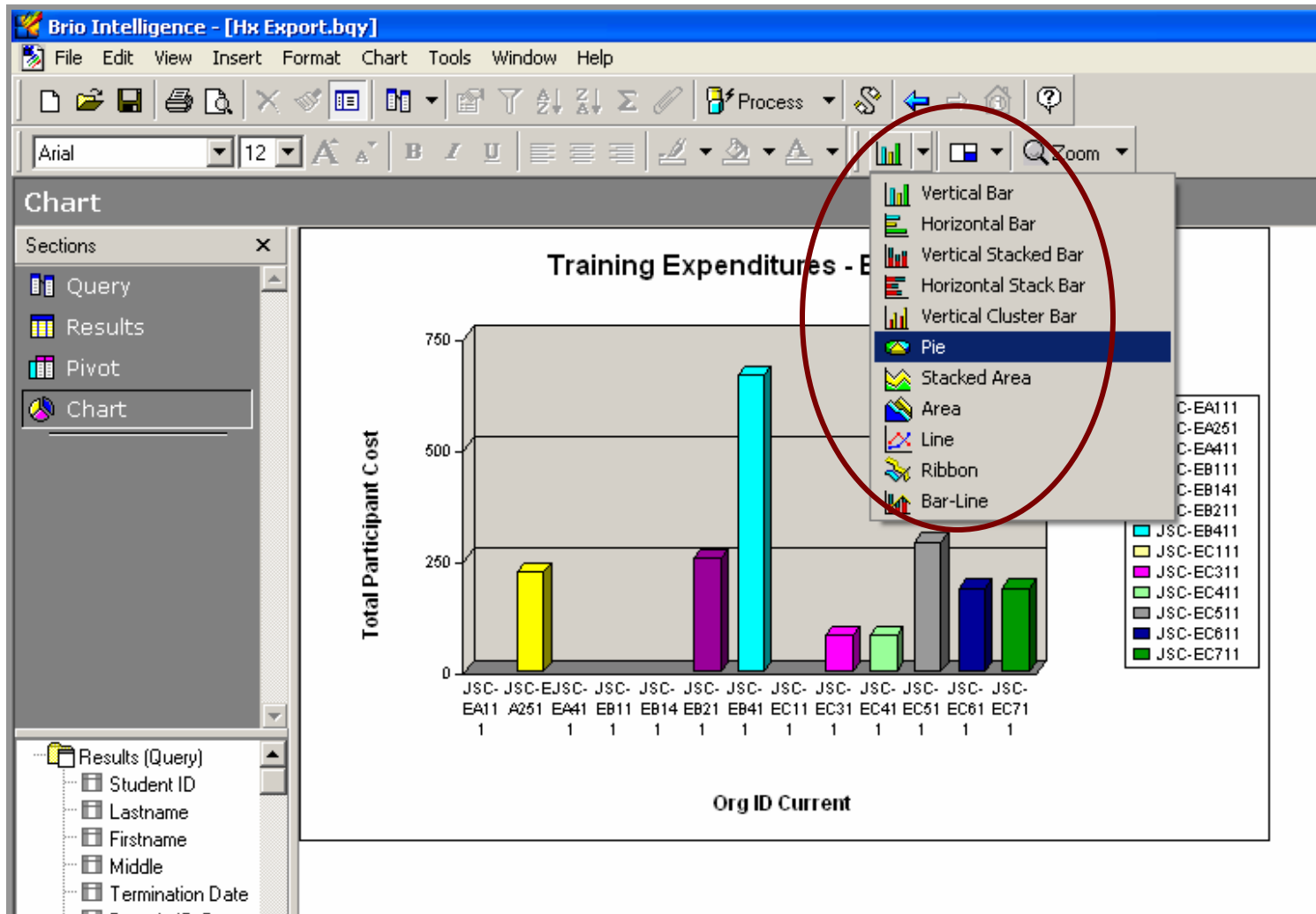
Exercise 7: Charting and Graphing

Step 1: To graph the pivot table, click Insert > Chart This Pivot.

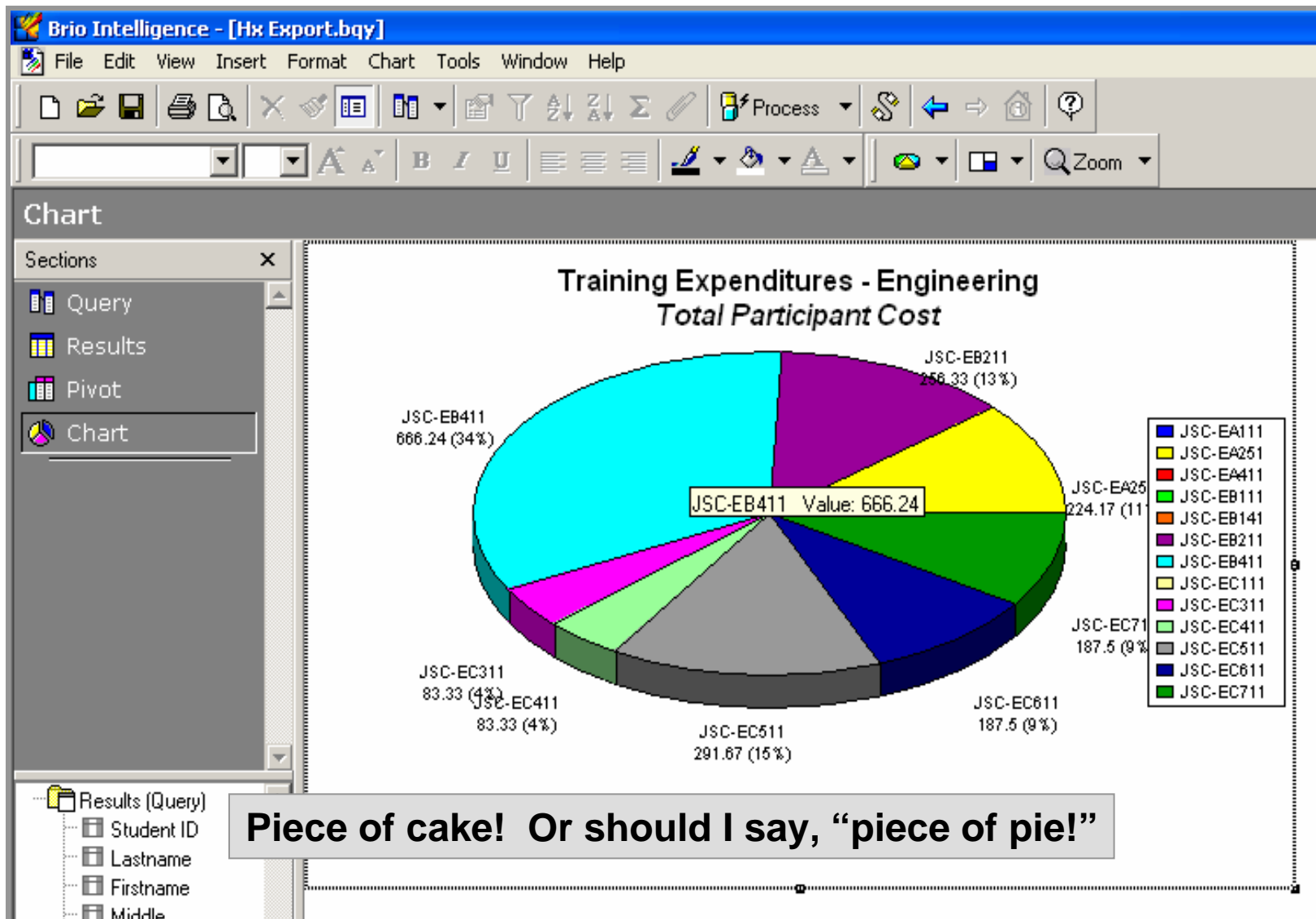


Exercise 7: Charting and Graphing

Step 2: Choose how to display information. Change the bar graph into a pie chart.



Exercise 7: Charting and Graphing



Exercise 7: Charting and Graphing

To create a custom chart/graph,
Step 1: Click Insert > New Chart.

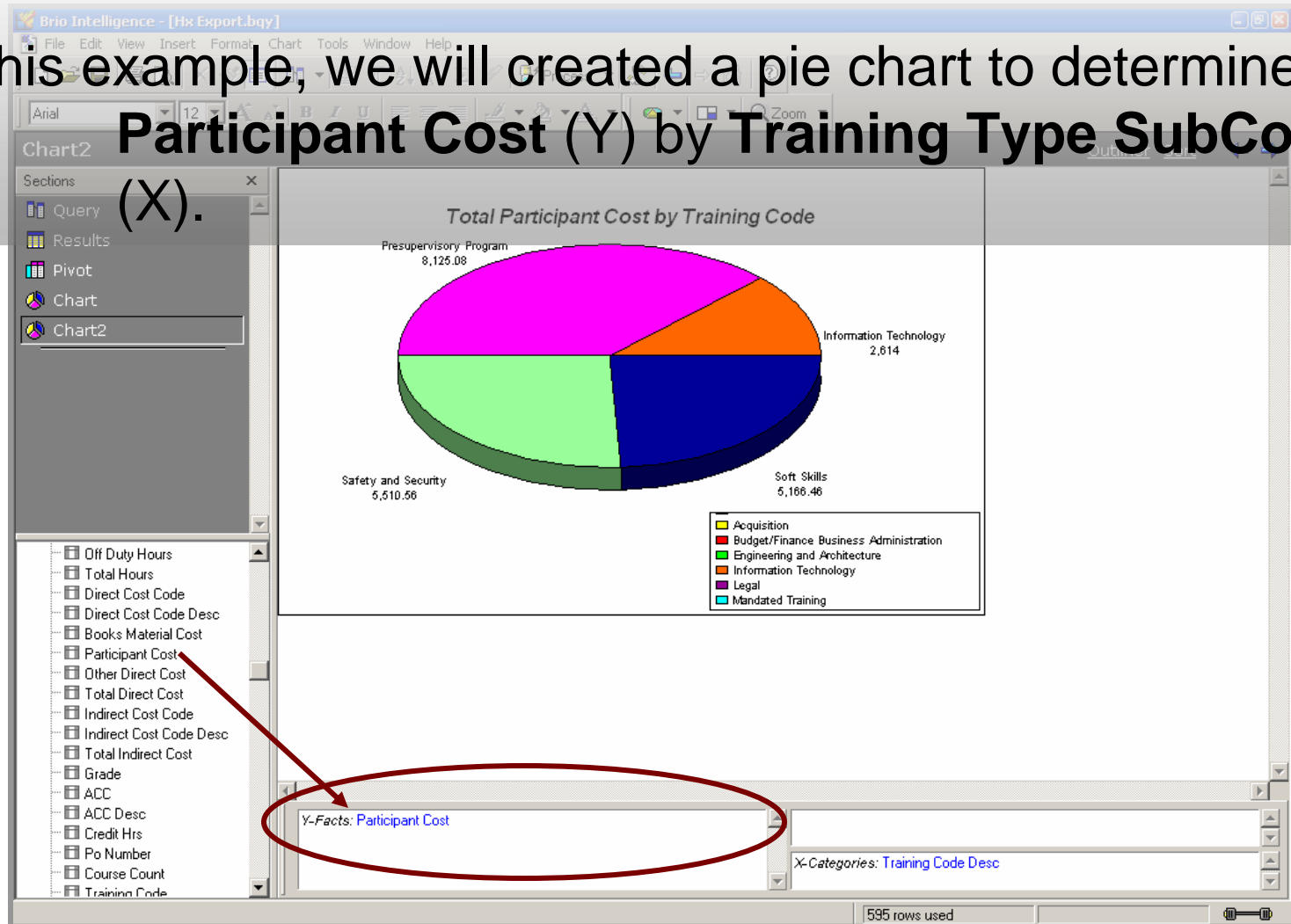
The screenshot shows the Brio Intelligence [Hx Export.bqy] application window. The 'Insert' menu is open, and the 'New Chart' option is highlighted. A red circle is drawn around the 'Insert' menu and the 'New Chart' option. The 'Results' pane on the left shows a table with 11 rows and 8 columns. The table data is as follows:

	Po Number	Course Count	Training Code	Training Code Desc	Component Type	Poc	Source of Training	Source of Training Desc
1		Do Not Use - Not in Satern	10	Acquisition	COURSE		01	Government Intern
2		Do Not Use - Not in Satern	04	Engineering and Architecture	COURSE		01	Government Intern
3		Do Not Use - Not in Satern	04	Engineering and Architecture	COURSE		01	Government Intern
4		Do Not Use - Not in Satern	04	Engineering and Architecture	COURSE		01	Government Intern
5		Do Not Use - Not in Satern	04	Engineering and Architecture	COURSE		01	Government Intern
6		Do Not Use - Not in Satern	04	Engineering and Architecture	COURSE		01	Government Intern
7		Do Not Use - Not in Satern	04	Engineering and Architecture	COURSE		01	Government Intern
8		Do Not Use - Not in Satern	04	Engineering and Architecture	COURSE		01	Government Intern
9		Do Not Use - Not in Satern	12	Safety and Security	COURSE		01	Government Intern
10		Do Not Use - Not in Satern	12	Safety and Security	COURSE		01	Government Intern
11		Do Not Use - Not in Satern	01	Legal	COURSE		01	Government Intern

Exercise 7: Charting and Graphing

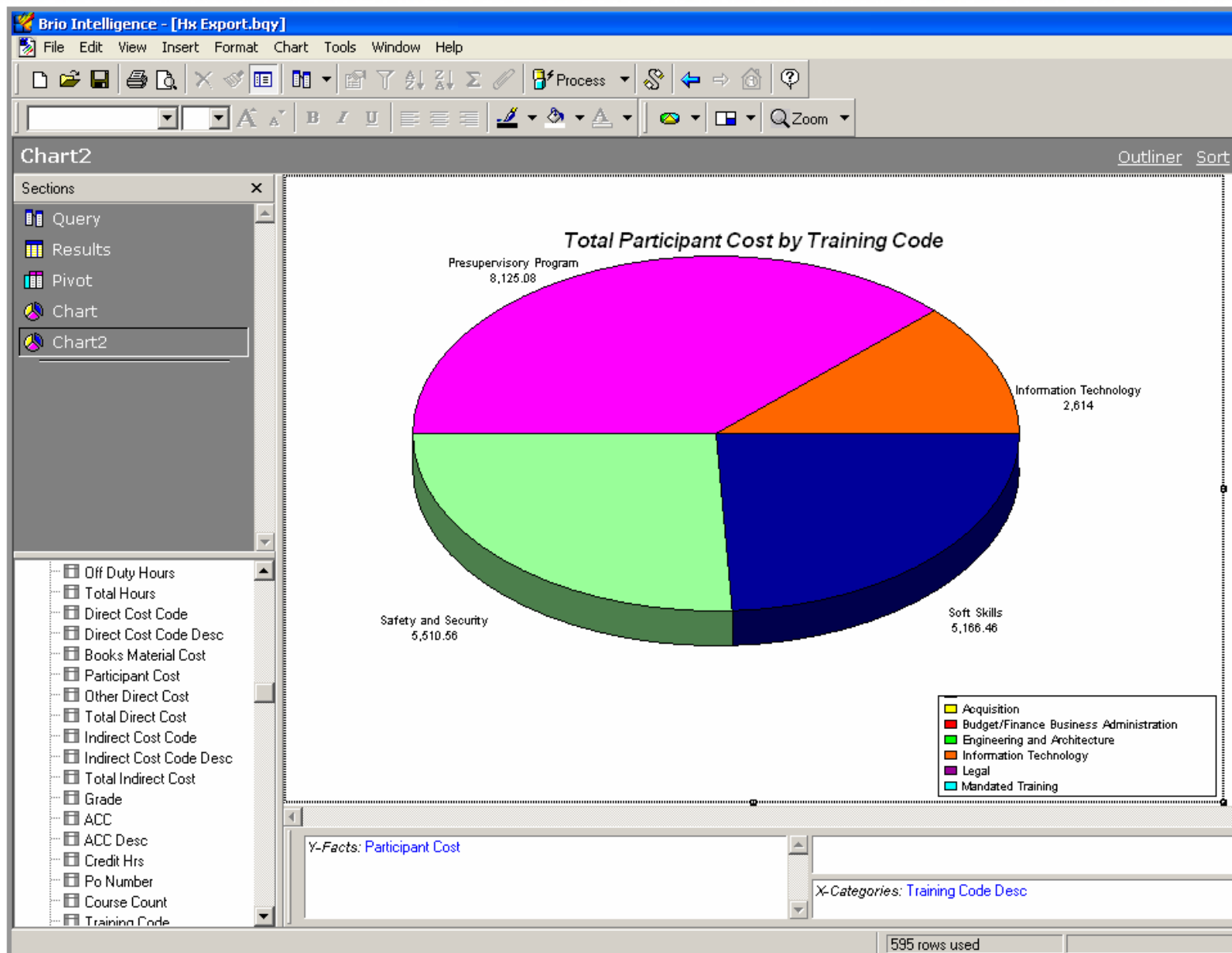
Step 2: Click and drag the data elements to the X and Y axes.

In this example, we will create a pie chart to determine **Participant Cost (Y)** by **Training Type SubCode (X)**.



Exercise 7: Charting and Graphing

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Other Useful Reports

- Agency Sum of Comp Training
- Agency PW Training Instances
- Participant List by Course



Questions?